

**THE ESTABLISHMENT OF AN ADJUSTMENT MODEL
FOR EXPATRIATES**

By

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Abstract

The purpose of the study was to determine whether relationships exist between expatriates' levels of emotional health, personality, and their perception of the organisational climate while on international assignment, and to present the outcome of the study as a model. An experimental group (consisting of 82 expatriates) and a control group (consisting of 42 managers employed in South Africa) were assessed with the Sense of Coherence and Hardiness Scales (as indicators of their levels of emotional health), the Organisational Climate Questionnaire, and the Sixteen Personality Factor Questionnaire. These assessments were conducted on the two groups in three phases, i.e. prior to the experimental group's departure on assignment, after spending six months on assignment, and on their return to South Africa after completing their assignments.

The results indicate that meaningful and significant relationships exist among a significant number of the factors investigated in the study, and which explains the expatriate's levels of emotional health while under pressure on assignment in the foreign country. Some of the factors were also identified as important indicators of characteristics required for successful expatriation.

The empirical expatriate emotional adjustment model that is proposed in this study is viewed as a potential instrument that can be utilised by human resource practitioners and line managers to manage their international workforce within the framework of scientifically based processes and principles.

DIE DAARSTEL VAN 'N AANPASSINGSMODEL VIR EKSPATRIATE

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Opsomming

Die doel van die ondersoek was om vas te stel of daar beduidende interaksie tussen ekspatriate se vlakke van emosionele gesondheid, persoonlikheid, en hul persepsie van die klimaat in die organisasie voorkom. 'n Model is ontwikkel om moontlike interaksie aan te dui. Ten einde die doel te bereik is gebruik gemaak van 'n eksperimentele groep bestaande uit 82 langtermyn ekspatriate in die buiteland, en 'n kontrole-groep, bestaande uit 42 individue werksaam in bestuursposte binne Suid-Afrika. Beide hierdie groepe is ge-evalueer met die Sense of Coherence en Hardiness vraelyste (as aanduiders van hulle vlakke van emosionele gesondheid), die Organisasie-klimaat-vraelys, en die Sestien Persoonlikheidsfaktor-vraelys. Hierdie evaluering het plaasgevind in drie fases, voor die eksperimentele groep se vertrek op die langtermynprojek, na ses maande op die projek, en na hul terugkeer na Suid-Afrika.

Die navorsingsresultate dui aan dat daar belangrike verwantskappe tussen sommige faktore wat ondersoek is, voorkom. Hierdie verwantskappe tussen die faktore verskaf duidelikheid oor die ekspatriate se vlakke van emosionele gesondheid tydens die persoon se blootstelling aan druk tydens die langtermynprojek in die buiteland. Sekere van die faktore is ook as belangrike eienskappe geïdentifiseer om die toekomstige sukses van 'n ekspatriate verseker.

Die empiriese model wat uit hierdie studie spruit is 'n potensieel- waardevolle instrument wat menslike hulpbronpraktisyns en bestuurders kan aanwend om hulle internasionale werkerskorps volgens wetenskaplik-gefundeerde beginsels en prosesse te bestuur.

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Chapter 1

General Introduction

1.1. Background to research project

“At the Mandla Hill and Arcades shopping centres in Lusaka, it is easy to forget that you are in Zambia’s capital. For those travelling north of South Africa, the scene is eerily familiar: they can shop at the Shoprite and Woolworths supermarkets and go for a bite to eat at Debonairs Pizza. MTN pre-paid mobile phone cards are for sale at traffic lights and there is a choice of films at the Ster-Kinekor cinema or on the M-Net satellite-television channel...” (The Economist, 2006: 44).

From the above quote it becomes evident that the number of countries in which many South African companies conduct their business has expanded drastically during the past few years. Expatriates play a vital role in managing these international businesses effectively. Only 15 years ago it would have been unthinkable for South African business to be conducting business outside of the country’s borders. Since the acceptance of South Africa into the international community after the first democratic elections in 1994, the business environment in the country and in the broader Southern African subcontinent has changed drastically as local companies quickly adjusted to the global economy.

In line with international trends, South African companies have been extensively increasing their exposure to international markets. South Africa is currently one of the largest investors in sub-Saharan African countries, and is making a substantial contribution in driving their economic development (The Economist, 2006).



From a global perspective, examples of South African companies that have even gone so far as to move their central business units to other locations in the world include South African Breweries Miller, Anglo American, Investec, BHP Billiton, Rembrandt, and Old Mutual (Business Day, 2005). In order to survive, South African companies have also been required to compete against global companies for example Barclays Bank, Coca Cola, BMW, British Petroleum, Siemens, Motorola, and Shell Oil (The Economist, 2003).

One of the most challenging issues facing not only South African companies who are expanding internationally, but also multinational firms across the world is the management of the human resources required to ensure the successful management of their diverse international interests. In order to meet the increasing need to manage these off-shore operations in foreign countries, companies increasingly make use of expatriates (Suutari & Brewster, 2003). The cost of sending expatriates overseas on international assignments is estimated at around one million rand per year for a three-year executive assignment (Van der Bank & Rothman, 2002). Therefore, the effective management of the expatriates has become a strategic priority.

Despite the strategic role that these international assignments play in the success of the business venture, many companies have a rather narrow and short-sighted view of how these assignments can be effectively utilised and who should be involved in them. Cascio and Aguinis (2005) are of the opinion that most companies make use of international assignments primarily with the purpose of meeting the requirements of a specific position and their inability to fill the position with a host-country employee. In the experience of Cascio and Aguinis (2005), international assignments are most often utilised to “fight fires”. The consequences of making use of this “fire fighting approach” can be severe and wide-ranging.



1.2. Need for this research

Hawley (1999) found that between 16 and 40 percent of South African expatriates sent on international assignments to foreign countries, do not complete their assignments. As high as 50 percent of the expatriates who do not end their assignments early operate at a low level of effectiveness. Van Heerden and Wentzel (2002) agree with Hawley in this regard, indicating that 23 percent of South African expatriates fail and return prematurely from their international assignment.

The above mentioned figures correlate well with international statistics, which indicate the proportion of expatriates from the United States of America who fail in their international assignments ranges from 10 to 45 percent, with the higher rates associated with assignments in underdeveloped or developing countries (Black et al, 1999: 11).

Depending on the expatriate's remuneration package and whether his family were also reallocated to the foreign country, a failed international assignment can cost a company between R500 000 and R2 million (Van Heerden & Wentzel, 2002). These do not include hidden costs such as strained customer relationships, ineffective communication, poor morale among employees, downtime costs, and friction between the parent company and foreign operations. Expatriate failure also directly impacts on the performance of the individual concerned. From a work perspective, the person's inability to complete the assignment will have a detrimental impact on his levels of productivity and motivation, as well as the availability of future promotional opportunities in the company. From a personal perspective, the well-being of the accompanying family will also be threatened (Beaverstock, 2000).

In the survey conducted by Van Heerden and Wentzel (2002), South African companies involved with expatriation indicated the following main reasons for failed assignments:

- Personal reasons : 62 percent
- Health considerations : 10 percent
- Performance-related matters : 28 percent



The above mentioned figures are in line with international findings (Brotchi and Engvig, 2006), where the reasons for expatriate failure were (in descending order of importance):

- inability of spouse to adjust to the living conditions in the foreign country,
- expatriate's own inability to adjust to the foreign environment,
- impact of the expatriation process on the family,
- expatriates' levels of emotional maturity,
- inability of expatriate to cope with pressure associated with managing larger overseas responsibility.

These findings indicate that lack of technical skills is seldom the primary cause of expatriate failure, and that the major reasons for expatriate failure can be associated with issues related to the expatriate's emotional well-being outside the work environment. These issues have very little to do with the individual's technical or managerial ability to perform the actual job effectively. Despite the convincing statistics available on the importance of focusing on the emotional well-being of the expatriate and his ability to cope with the foreign expatriate environment, the survey conducted by Van Heerden and Wentzel (2002) found that of the South African companies included in the survey, only 48 percent of them conducted proper selection processes on future expatriates prior to assignments. In addition, only 29 percent of the participants focused on aspects other than technical or managerial competence during their selection of future expatriates.

Cascio and Aguinis (2005) also found that, despite the importance of all the other criteria related to expatriate success, most international companies seem to focus their efforts during their selection of candidates for expatriation solely on two criteria, namely technical ability and willingness to go on an international assignment.



1.3. Problem statement

From the above mentioned observations it becomes clear that companies tend to place most of their human resources efforts on those factors that have been proven to be of less importance in determining expatriate success – technical and management competence and performance. The observations also indicate that, in order to ensure the success of their expatriates during international assignments, organisations need to place a lot more emphasis on the management of the expatriates' emotional well-being and health in adjusting to the foreign environment and country.

According to Marx (1999), expatriates progress through a normal and predictable series of development phases when they embark on international assignments, namely the recruitment and selection phase, the actual period abroad, and the repatriation back to the home-country on completion of the assignment. Adler (1997) also refers to these three phases as part of the expatriate's international career cycle. The various phases of adjustment in the expatriate career cycle each requires of the individual to be able to deal with substantial levels of pressure and emotional turmoil (Fitzgerald-Turner, 2003).

A significant requirement of the individual during these phases is to remain emotionally healthy, despite being faced with a multitude of external pressures and demands exerted on him from the external environment in the foreign country - both at a professional and a personal level. Kaplan and Sadock (1991: 224) indicate that the individual expatriate is exposed to severe levels of psychosocial stress during his relocation into the foreign country, which could potentially lead to him experiencing symptoms of emotional fatigue. In extreme cases, this transition could lead to severe levels of distress to the individual.



Kaplan and Sadock (1991: 224) refer to the Diagnostic Manual of Mental Disorders, which provides a 6 point “Severity of Psychosocial Stressors Scale” for categorising the psychosocial stressors that significantly contribute to the development of psychological and physical illness. On this scale, a score of 6 represents catastrophic stress (for example being placed in a concentration camp), and a score of 1 represents no apparent stress. Expatriation and relocating to a foreign country or culture, on the six-point scale, is given a rating of 4. This represents severe stress. The impact of expatriation on the individual’s emotional wellbeing is rated similar to the stress caused by divorce, poverty, and chronic life threatening illness in parents.

In agreement with Kaplan and Sadock, Anderzen and Arnetz (1999) indicate that 6 out of 10 international assignments involve sufficiently high levels of stress on the expatriate to cause either an early return or at least a significant drop in effectiveness and professional performance.

However, the expatriates themselves also have an active role to play in adjusting to the demands placed on them. The core reason why companies make use of expatriates is to adjust as quickly as possible to the work environment in the foreign country, and achieve certain very specific work-related objectives. In order to attain these objectives, it is imperative for the person to possess and utilise the appropriate coping mechanisms and personality traits that will enable him to remain productive and emotionally healthy during the various phases of the international assignment.

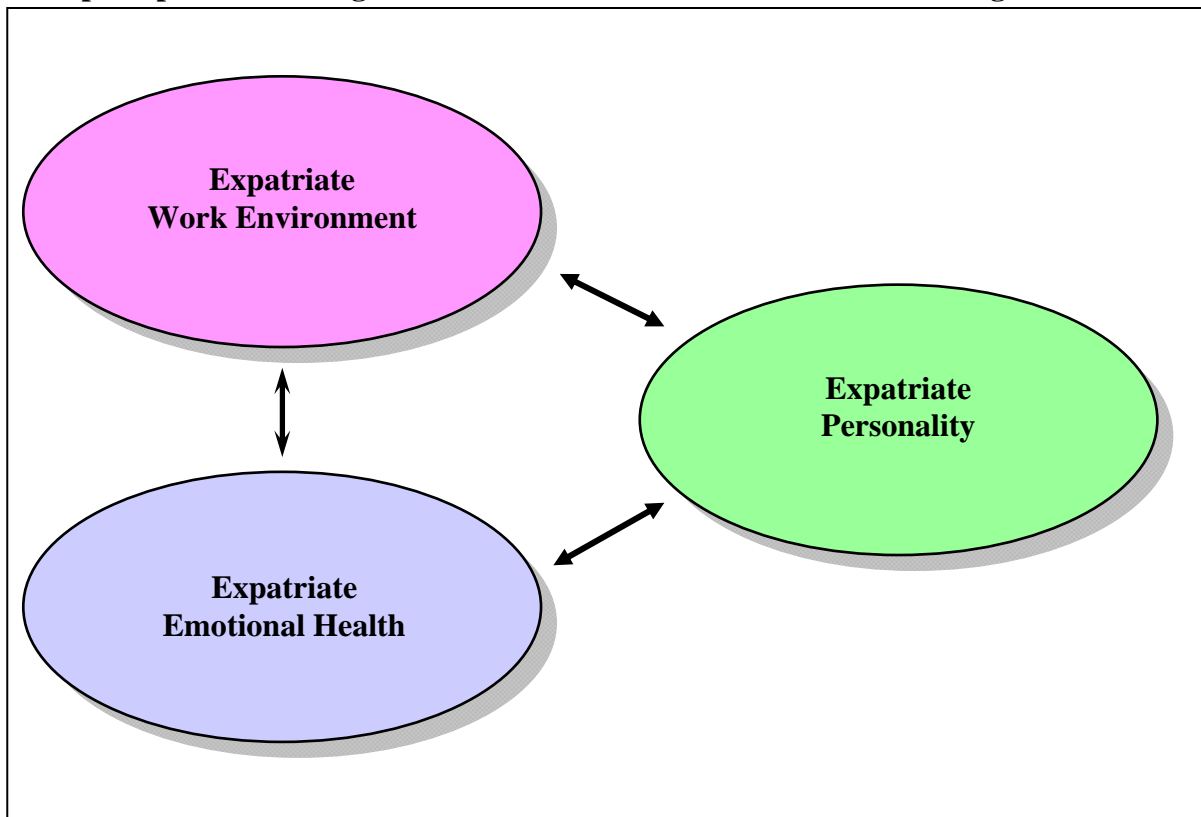
Against the background of the above mentioned discussions, it is evident that there is a need to investigate the interaction that takes place among the expatriate’s levels of emotional health, his personality, and his perception of the organisational climate while on international assignment in a foreign country.

1.4. Aim of this research

The aim of the study is to determine whether relationships exist between the expatriate's levels of emotional health, personality, and his perception of the organisational climate while on international assignment, and to present the outcomes of the study as a model. An understanding of this relationship among the three factors will provide both line management and Human Resource practitioners with valuable insight into the expatriate adjustment process and the impact it has on the performance of the employees they send on international assignments to subsidiaries in foreign countries.

A graphical layout of a potential model that displays the interaction among the three factors is presented below:

Figure 1.1: Possible relationships among expatriate emotional health, personality, and perception of the organisational climate while on international assignment





In order to determine and explain the nature of the interaction among the different variables, the following specific research objectives are set:

- Objective 1: To establish the impact of the expatriation process on the individual's emotional health. A comprehensive literature study will be provided in Chapters 4, 5, and 6 on the influence of the various international assignment phases on the emotional health of the expatriate. More specifically, the relationship between the expatriation process and Sense of Coherence and Hardiness as measurements of expatriate emotional health will be discussed in Paragraphs 7.5.3 and 7.6.3 in Chapter 7. The discussion of the results obtained from the study in achieving Objective 1 are provided in Paragraph 10.2 in Chapter 10;
- Objective 2: To determine the interaction that exists between the expatriate personality and the individual's emotional adjustment during the various phases of the expatriation process. The literature study providing the background to the relationship between personality and expatriation is provided in Paragraph 7.7.3 in Chapter 7. The discussion of the results obtained in achieving Objective 2 are presented in Paragraph 10.3 in Chapter 10;
- Objective 3: To ascertain the impact of organisational climate factors on the emotional adjustment of the individual prior to departure on the international assignment, and while on contract. In Paragraph 5.5 (Chapter 5) an investigation is conducted on the factors influencing cross-cultural adjustment and subsequent emotional health. Paragraph 10.4 in Chapter 10 provides a discussion on the outcomes of the statistical analyses conducted in order to achieve Objective 3;
- Objective 4: To establish the nature of the relationship that exists between expatriate personality and the individual's perception of the organisational climate. The literature study conducted in achieving the previous objectives provides the background to Objective 4. The outcomes of the statistical analyses conducted in accomplishing Objective 4 are discussed in Paragraph 10.5;



- Objective 5: To investigate the main personality and organisational climate predictors of the expatriate's levels of emotional health while on international assignment in a foreign country. The results relating to Objective 5 are discussed in Paragraph 10.6.

1.5. Layout of study

In order to achieve the above mentioned objectives, the research will be conducted in three sections. A layout of the process to be followed in the study is provided below:

Section 1: Setting the scene for expatriation

Chapter 2: Globalisation

Chapter 3: Expatriates

Section 1 provides a strategic overview of the global and international business dynamics that need to be taken into account when investigating the expatriation process.

In Chapter 2, globalization is discussed, as well as expected future trends in the development of globalisation. Approaches utilised by companies in internationalising and adjusting themselves to the demands placed on them by the globalised environment are also discussed in this chapter.

In Chapter 3 a detailed analysis is conducted on expatriates, the approaches utilised by international organisations in utilising expatriates, as well as the impact that failed international assignments have on both the organisation and on the individual.



Section 2: Individual adjustment to the expatriate international career cycle

Chapter 4: Selection and preparation prior to international assignment

Chapter 5: On international assignment

Chapter 6: Repatriation on completion of international assignment

Chapter 7: Expatriate emotional adjustment

In Section 2 a literature study is conducted on the dynamics and complexities involved with each of the phases of the international career cycle, with specific focus on the work and organisational environment within which the expatriate is required to function while on assignment. These areas are covered in Chapters 4, 5, and 6.

Chapter 7 investigates the expatriate emotional health, taking into account the unique demands placed on him during the various phases of the international career cycle as discussed in the previous chapters. Attention is also given in this chapter to the interaction between personality and the expatriate's ability to remain emotionally healthy.

Section 3: Empirical research and results

Chapter 8: Research design

Chapter 9: Results

Chapter 10: Discussion

Chapter 11: Conclusions and recommendations

Section 3 contains the empirical research that is carried out in order to achieve the research objectives of the study as highlighted earlier in this chapter.



In Chapter 8, a detailed review is provided of the research design and methods to be followed in the study.

Chapter 9 entails a description of the results obtained from the research conducted.

A detailed discussion is conducted in Chapter 10 on the results obtained within the context of the literature study conducted earlier in Section 2.

Finally, a conclusion on the extent to which the research objectives have been achieved as obtained from the statistical analyses is provided in Chapter 11. Recommendations for future research are presented in this chapter, with specific reference to any potential limitations that may have been identified.



Section 1

Setting the scene for expatriation

Overview

In Section 1 of this research, a background exploration is conducted on the strategic factors that need to be taken into account when companies wish to make use of expatriates in extending their business operations on an international basis.

In Chapter 2, the multidimensional and constantly changing global environment is investigated within which multinational companies and expatriates are required to function and remain competitive.

An analysis is conducted in Chapter 3 on the various approaches utilised by companies to ensure they make effective use of the human resources available to them. In addition, the complexities involved with the utilisation of expatriates are also discussed, as well as the potential consequences of the expatriation process on the expatriate, his family, and the organisation.

The above mentioned discussions serve as background to the literature study conducted in Section 2, where the focus is placed on the expatriate and the emotional adjustment processes involved with the expatriate's progress through the various phases of the international career cycle.



Chapter 2 Globalisation

2.1. Introduction

“The rapid globalization of business and its impact on firms is beyond dispute. The debate in corporate boardrooms now focuses on how to respond to the demand to be globally integrated while also being responsive to various local market needs. It multinational firms are to prosper now and in the future, they must develop people who can successfully function in a global context...” (Black et al, 1999: xi). From the above mentioned quote it becomes evident that the extent to which a company is able to adjust to globalisation will have a determining effect on its success. In order for the company to position itself appropriately in the globalised business world, it is critical to obtain a thorough and detailed understanding of globalisation, its various components, and the impact it has on the way the company needs to manage its international workforce.

The company’s adjustment and growth in this global business environment will have a direct impact on the organisational climate within which the expatriate is required to function. In order to obtain a realistic perspective of this environment within which the expatriate needs to function, it is important to obtain a more comprehensive understanding of the global forces having an impact on the organisation and the individual. A more detailed discussion on the “globalised world” also presents a meaningful perspective of the environment within which the expatriate is required to function.

In Chapter 2 the term globalisation is discussed, its characteristics, as well as the benefits and challenges associated with it. Attention is also given to expected future trends in the development of globalisation. In addition, the various approaches utilised by companies in internationalising and adjusting themselves to the demands placed on them by the globalised environment are discussed.



2.2. Globalisation defined

The term "globalisation" has become one of the buzzwords commonly used by businesses, governments, unions and community activists. However, depending on their particular frame of reference, these parties may attach very different meanings to the term. For the purposes of clarity and consistency, it is therefore important to obtain a clear understanding of globalisation.

Within the framework of the expatriate environment, clarity on the term globalisation will also lead to an appreciation of its impact on business and expatriates. This, in turn, will ensure that the most appropriate approaches are utilised to facilitate the management of an international workforce in the new global work environment (Jauch, 2000). Depending on the framework within which globalisation is discussed, various definitions exist for the term.

Cascio and Aguinis (2005) refer to globalisation as commerce without borders, along with the interdependence of business operations in different locations. Chronicles of Higher Education (Jan 23, 1998) states that "*Globalisation is most often used to describe the growing integration of economics worldwide through increases in trade, investment flows, and technology transfer. The term conveys a sense that international forces are driving more and more developments in the world, and thus crystallises both the hopes of some people that we will finally achieve a global society and the fears of many others that their lives and jobs are threatened by forces beyond their control.*"

Rothenberg (2003) defines globalisation as follows: "*Globalisation is the acceleration and intensification of interaction and integration among the people, companies, and governments of different nations. This process has effects on human well-being, on the environment, on culture (including ideas, religion, and political systems), and on economic development and prosperity of societies across the world*".



The most comprehensive definition is provided by the International Monetary Fund (2002), who refers to globalisation as “*the trend towards increasing integration of economies across the world in terms of goods, services, ideas, information, and technology*”. According to this description of the term, globalisation can be divided into three basic facets: economic, political, and cultural globalisation. Of the three facets, economic globalisation is the dominant trend from which the other two flow. From this dominant economic perspective, globalisation includes unrestricted international trade, free and borderless movement of capital, privatisation, industrialisation of economies, the rapid growth of trans-national corporations, and the globalisation of employment.

Specific attention will now be given to the impact of the globalised economy on organisations and employment practices.

2.3. Globalisation of employment

The Secretary General of the International Monetary Fund, Mr Stanley Fischer (International Monetary Fund Staff Brief, 2002) points out that: “*Globalisation has led to a global labour market in which workers of all countries are in direct competition with each other*”. He continues by stating that, as a result of the mobility of capital, it will soon be possible for international companies to have the best of all worlds: high productivity, high technology, and low wages: “*It costs US\$25 an hour to employ a production worker in Germany, US\$16 an hour in the United States; but only US\$5 in South Korea, US\$2.40 in Mexico, US\$1.40 in Poland, and 50 cents or less in China, India and Indonesia*”.

Both Van Zyl (2001) and Jauch (2000) agree with this opinion, indicating that the mobility of capital has substantial implications for employed people in all countries of the world. These implications may, however, differ for employees in developing and industrialised countries.



Traditionally, labour power has its foundation in the fundamental interdependent relationship between capital and labour. Employees exercise their power by threatening collectively not to provide their services, which is a fundamental element of the production process. This capacity of workers to exert this power used to be founded in the fact that capital could not simply be withdrawn from its inherently interdependent relationship with labour. In a closed economic system, the national government of a country is able to establish the rules for collective bargaining between employers and employees through national labour laws.

While this principle may still apply to domestically-based companies, Van Zyl (2001) indicates that the current trend is for trans-national corporations attempting to escape the rules of national bargaining. The globalised world economy, combined with new technology, has created a favourable basis for capital to be diverted easily to other countries. This is done by relocating production to other countries with more lenient labour laws and cheaper labour costs, or by outsourcing production to other countries.

As a result of this mobility of capital, national states that depend on foreign investment are constantly required to maintain conditions that will avoid the outflow of capital. These conditions may often be directly in conflict with the interests of workers. Consequently, countries and workers are competing against each other in order to become "competitive" (Van Zyl, 2001; Jauch, 2000). As corporations move production sites to the most favourable areas where low wages, skilled labour forces, and political stability are in place, an increased mobility in labour markets is created.



According to Henriott (1999), this process could lead to a vicious circle. Labour standards are directly influenced to the detriment of workers in developing countries, and could even threaten the well-being of workers in the industrialised world. Jauch (2000) asserts that “*at best, a small group of workers will gain some jobs for a short period of time - until capital finds more attractive conditions elsewhere*”. As a result of the above mentioned forces playing a role in this vicious circle, an environment is created where only the multinational corporations benefit to the detriment of the employees in individual national states.

On a positive note, Robbins (2003) is of the opinion that the relationship between employer and employee will change significantly in the new globalised company. The employment relationship will be much more flexible and customisable, characterised by aspects such as telecommuting, job sharing, and a strong emphasis on payment for critical skills. This strong need for flexibility will require organisational systems, processes, and people that can respond quickly and appropriately to different situations. In order to facilitate this more flexible organisational approach, fewer detailed rules and procedures will be in place in the company. Employees will also be provided with greater autonomy, and encouraged towards higher levels of creativity and initiative (21st Century Organisational Trends). However, employees will be required to be much more flexible in an era of lifetime employability, as opposed to lifetime employment.

2.4. The role of trans-national corporations in globalisation

One of the characteristics of the global economy is the unparalleled concentration of economic power (Soros, 2000). A major role player in the world of globalisation is the large trans-national corporations. The United Nations Economic and Social Council (2003) refers to the term “trans-national corporation” as “*an economic entity operating in more than one country or a cluster of economic entities operating in two or more countries - whatever their legal form, whether in their home-country or country of activity, and whether taken individually or collectively*”.



According to The New Internationalist Magazine (2004), of the largest 100 economic powers in the world, 50 are global corporations. More than 25 percent of business transactions in the world take place within the 200 largest corporations. Trans-national corporations control approximately 70 percent of all world trade, and almost half of this trade takes place between different parts of the same trans-national corporation.

Soros (2000) asserts that intense competition exists among trans-national corporations from the United States of America, Western Europe, Japan and Asia. Soros is of the strong opinion that these trans-national corporations are the power underlying a system of economic capitalism which progressively manipulates conditions across the world allowing these trans-national corporations to undermine the laws and authority levels of national states. As the pressure is intensified on individual countries to maintain investments from increasingly powerful trans-national corporations, they attempt to attract investors by making themselves 'competitive'. This often takes place by relaxing labour legislation, and by reducing employee remuneration and benefits.

The New Internationalist Magazine (2004) also expresses some concern towards trans-national organisations. According to them, a major drive for trans-national organisations is to achieve maximum profit, dominance and power within the shortest period of time, without always having sufficient regard for the impact their actions have on stakeholders such as individual countries, employees, and the environment. As a result of their activities, an open global economy is developing as protective legislation within countries is diminished. This allows trans-national corporations to capture markets internationally under the pretence of 'free trade'.

Trans-national corporations are also in the process of creating integrated operations in various countries, or forming strategic coalitions with other organisations (Van Zyl, 2001; Jauch, 2000). The New Internationalist Magazine (2004) comments that 66 percent of international trade is accounted for by only 500 organisations. Within those organisations, 40 percent of the trading takes place among different parts of the same trans-national organisation.



As can be seen from the above discussion, trans-national corporations are very much an integral part of globalisation, and will continue to have a substantial impact on the way in which business is conducted within the new globalised economy.

2.5. The development of organisations in the global economy

2.5.1. Introduction

In order to understand how these trans-national organisations function, it is important to note the various stages they go through in their development towards internationalisation.

According to Black et al (1999), organisations develop in certain general and predictable patterns in the process of becoming globalised companies. Black emphasises that when the term globalisation is used within the context of an organisation's growth, the underlying principle is not one fixed point at which a company is globalised, but rather a series of globalisation patterns and certain of the specific international challenges and issues associated with each. Black et al identify five stages of organisational growth towards globalisation. Adler (1997) also refers to these stages as "stages of global development". The five stages are as follows:

- Domestic stage
- Export stage
- Multi-domestic stage
- Multinational stage
- Global (or trans-national) stage



At each of the above mentioned stages, the human resource management approach needs to be adjusted in line with the changes in strategic objectives, organisational structures, the products or services offered, profitability, and financial resources available for research and development (Adler, 2003). In this section, the various development stages will be discussed in more detail.

2.5.2. Domestic stage

Companies in the domestic stage focus almost exclusively on the domestic market of a country during their production and marketing of the products and services. The main approach utilised by a company in the domestic stage is one of "one best way". The company approaches the market with a product that has been researched, developed, and customised to market conditions in the home-country. Due to the novelty of the product, it has limited competition. As a result, the profit margins tend to be high (Adler, 1997).

Due to the fact that the company focuses primarily on the domestic market, no products are exported to foreign countries, and international business is not viewed as being important. The focus during the domestic stage is the product or service. Because the product or service is unique and has no international competition, the company does not need to demonstrate sensitivity to cultural differences in the client country (Adler, 1997).

During this initial domestic stage, the organisational structure and management approach is centralised (Adler, 1997). Management approaches and employees transferred from the home country play a dominant role in the company. Companies in the domestic stage tend to view culture and global human resource systems as largely irrelevant from a business perspective. Limited attention is also given to international cross-cultural differences. Because domestic companies only provide their products or services to customers in the local market, they make the assumption that only the local way of doing things in the home culture needs to be considered during the development, manufacturing, and marketing of such products or services. Due to the company's strong focus on the domestic market, the need to make use of expatriates is limited.



2.5.3. Export stage

The export stage is considered the first stage of global strategy. It is characterised by the emergence of foreign markets for standardised consumer products. As the organisation increases its exposure to international markets the emphasis moves from the creation of a new product, to the marketing of the product in foreign countries (Hindle, 2003).

The typical company in the export stage could be a large national producer that starts exploiting its economies of scale to market and distribute products to other countries (Hindle, 2003). Export companies typically expand first to the closest bordering countries, before moving into unfamiliar parts of the world. During the initial stages of a company becoming international, its products or services are sold abroad, manufactured at home and controlled by their operations in the home-country.

In export-orientated companies, international assignments and assignees are often not viewed as being of high importance, and expatriate managers are not often utilised (Adler, 1997). The preferred approach is for home-based managers based in the home country to have geographical or product responsibilities, which include visiting the various off-site operations on a regular basis.

Where international managers are utilised on occasion, they are normally appointed in general management positions, and tend to be responsible for relatively large geographical areas. Most expatriates are sent out from the parent company, and very few managers are transferred from foreign countries into the parent organisation or between foreign operations.

Black et al (1999) comment that the focus of international people-management activities during the export stage is often the staffing, training, appraising, rewarding, and development of local nationals on the same basis as employees in the parent company. However, they also caution that the company may experience some difficulty at this stage when it begins to make international activities a stronger priority.



During the export stage, the organisation may decide to send its best employees out to its now-more-strategically important international operations. Unfortunately, the minimal attention on international assignments and assignees may make this action a difficult transition. Because the company has not valued international assignments, the best employees may be reluctant to go “out of sight and out of mind”.

2.5.4. Multi-domestic stage

According to Hindle (2003), a company in the multi-domestic growth stage is one that has numerous foreign operations in foreign countries. However, each of these foreign affiliates is primarily focused on local markets, competitors, etcetera. This situation results in multiple domestically focused operations. Such multi-domestic companies are most common in industries where competition in one country (or in a small group of countries) is independent of competition in others. Because competition for each geographically distinct unit within the company is focused on the country and the market in the unit’s location, a high degree of specialisation and adaptation of the unit’s value-chain activities is required.

The culture- and country-specific knowledge among local national employees at the operations in the foreign countries becomes important for the appropriate specialisation and customisation of the foreign subsidiary’s activities (Adler, 2003). As a result of the high need for country-specific knowledge, the use of international managers is still relatively low in multi-domestic corporations. The international managers tend to be of two types: executives or technical specialists. The executives often tend to be “career internationalists” who spend most of their careers outside the company’s home office and home-country. The technical specialists are generally on assignment for a relatively short time (one to two years) and are overseas for specific reasons (for example, to transfer a particular technology or to solve a specific operational problem).



During the multi-domestic stage, competent people but not outstanding performers or high flyers are typically sent to foreign countries as expatriates (Adler, 2003). The multi-domestic orientation generally does not lead to systematic policies and practices formed for expatriate selection, training, or repatriation. The reason for this lack of a structured approach towards expatriate management is that only a small percentage of employees in the company are actually utilised as expatriates on international assignments. Instead, multi-domestic companies tend to place more focus on international assignment compensation practices and policies in order to attract a sufficient number of reasonably capable international managers.

International operations are not highly valued or well integrated into the core business processes of the parent company during the multi-domestic stage. As a result, employees sent on international assignments are generally considered “out of sight, out of mind” from a parent company policy maker perspective (Adler, 2003; Black et al, 1999). These expatriate managers also often experience difficulty reintegrating back into the home office environment on completion of their international assignments. Further research conducted by Adler (2003) found that more than half of expatriates sent on assignments by international companies indicate that their foreign experience is damaging to their career and prospects in the company.

Black et al (1999) assert that it is of critical importance for multi-domestic companies to focus on all aspects of international assignments. International strategy formulation and implementation for the company in the multi-domestic stage tend to be primarily restricted to individual countries. In order for the country-based strategic plan to be effective, key executives must incorporate the important and unique aspects of the country, culture, and market where the unit competes in their business plans. It is therefore imperative for the success of the multi-domestic company to ensure that the right people are selected, trained, and prepared for a quick and effective adjustment in the foreign country, so that they can make timely and appropriate decisions about what and how things should be done in the local market.



2.5.5. Multinational stage

As companies develop from the multi-domestic to the multinational stage of globalisation, they move their emphasis from marketing to price. During the multinational stage, both the sales and manufacturing functions are transferred to locations around the world (Hindle, 2003). Driven by the necessity to cut costs, multinational companies relocate large segments of their production facilities to countries where overhead costs and wages are lower.

According to Hindle (2003), a characteristic of the multinational stage is that a number of companies manufacture and sell almost identical products, with the only significant competition being on price. The primary product design and marketing assumption during the multinational stage is no longer the domestic stage's "one best way" or the multi-domestic stage's "many good ways", but rather "one least-cost way". The primary market becomes global, with no significant market segmentation. The only way companies can achieve competitive advantage is by optimising economies of scale, process engineering, and by sourcing critical resources on a worldwide basis.

In the multinational stage, companies develop, manufacture, and market products in various countries around the world. Input cost plays a significant role in the selection and utilisation of human resources and other resource inputs. Distribution of products takes place on a worldwide basis, and profits are made through increased economies of scale (Black et al, 1999). However, control over the production processes remains in the centralised hands of the parent company head office. In contrast to the multi-domestic stage, multinational companies become more centralised, reverting decision making back to the parent organisation in the home-country.



In the multinational company the emphasis falls on the employment of locals in the various countries, as opposed to making use of expatriates. It is no longer required of the major decision maker for the foreign operations to be an expert in a specific field. The individual should rather be a competent and experienced manager of various interdependent foreign operations. Therefore, companies in the multinational stage tend to make use of senior managers at the parent company to manage multiple foreign operations. These managers are better able to align the foreign operations with the company's strategic objectives and core management processes (Adler, 2003).

2.5.6. Global stage

Black et al (1999) also refer to companies in the global stage as trans-national companies or multi-focal corporations. Companies at the global or trans-national stage of internationalisation are generally within industries where a company's position in one country is substantially influenced by its competitive position in another. The objective for the company with a global orientation is to coordinate value-chain activities on a global scale and thereby capture competitive advantages and links among countries.

In the global stage, top quality, least-possible-cost products become the minimum standard. Products and services become "mass-customised". The term "mass" is used in the sense that the development and manufacture of the products is influenced by the best ideas from sources across the world. "Customised" is used within the context of products that are modified and marketed to suit the requirements of very specific local populations and market niches (Hindle, 2003).

According to Hindle (2003), dynamics in the global stage tend to become more complex than in earlier stages of globalisation. The quest for world business becomes dominant during this stage. The primary orientation of the company is to align the various businesses, functions, and regions within the organisation with its strategic focus areas. Competitive advantage is obtained by means of strategic thinking, mass customisation, and out-learning competitors.



While effective global human resource management strategies did not play a significant role in the previously mentioned stages, they become essential during the global stage (Black et al, 1999). The effective management of the global workforce becomes a minimum requirement for organisational survival and success. As in the case of multi-domestic corporations, global strategy corporations also have geographically dispersed operations and units. However, in contrast to multi-domestic companies, trans-national corporations have extensive coordination between units in different geographical locations. This coordination and control is achieved through a variety of mechanisms.

An effective approach utilised by multinational corporations is the establishment of a common organisational culture in the organisation's worldwide operations (Black et al, 1999). Expatriate managers are sent on international assignments as the "glue of the company" to coordinate and integrate strategic activities, and not merely to achieve specific operational and project objectives.

In the global stage, the number of expatriates utilised by the company tends to increase (Adler, 2003). Trans-national corporations tend to utilise more international managers, both home-country and third country international managers, and place international managers in a variety of organisational levels within foreign operations.

2.5.7. Summary

A discussion was conducted in this section on the various stages through which the organisation develops from a domestic company to a global company, as well as the impact these stages have on the human resources management practices related to expatriates and international assignments.



Black et al (1999) strongly assert that a company's international assignment policies and practices must "fit" the environment and must be congruent with each other, irrespective of the globalisation stage within which the company finds itself. The balance between the organisation's international assignment policies and practices and the market place creates an external fit. The balance and congruence among the five aspects of people management within a company (staffing, training, appraising, rewarding, and developing) constitutes internal fit. Without good internal and external fit, a company will experience significant difficulties in effectively formulating and implementing strategies.

2.6. Future trends of internationalisation

2.6.1. Introduction

According to Leonard (2005), *"Over the next 25 years, the world will see the biggest shift in economic strength for more than a century. Emerging economic giants will dwarf developed industrial economies so that within a generation, China will overtake the United States as the world's biggest economy;... as many as nine of the top 15 economies will be from today's Third World - with Britain overtaken by such countries as Taiwan and Thailand..."*

In order to be successful in this constantly changing global business environment, companies will need to adjust their mindsets, structures and processes. According to 21st Century Organisational Trends (author unknown), the following five trends will characterise companies during the 21st century



2.6.2. Global strategy

According to 21st Century Organisational Trends (author unknown), the 21st century company will be faced with increasingly globalised sales, manufacturing, research, and management. As a result of this need for a globalised approach towards business, a movement is expected to take place from (a) direct exports to other countries to establishing distribution centres in various off-shore locations, (b) from currently only having manufacturing taking place in different countries to decentralising all divisions of the organisation across the globe. Some of the reasons for these trends will be improved quality of international transport and communication at a reduced cost, the continuously expansive search for unexploited markets, and to optimally utilise regional cost and expertise differences.

Hindle (2003) refers to a so-called “third age” in the global strategy of multinationals. In this third age of globalisation, Hindle argues that multinationals “will have to create a new mindset to achieve global competitiveness in the post-imperialist age”. According to Hindle (2003), indications are that there will be a significant increase in the number of multinational corporations that will shift the operation and control of key business functions away from their head office. A growing number of companies are setting up regional headquarters or relocating specific head office functions away from the home-country. Hindle quotes a recent UNCTAD survey that indicates that 829 head quarters operations of multinationals were relocated between January 2002 and March 2003, nearly a quarter of them in developing countries.

Hindle (2003) also predicts that a stronger emphasis will be placed on the outsourcing of key business processes in companies to locations in the developing world, as opposed to only an outsourcing of non-core processes such as human resources (also known as “offshoring”). This outsourcing of key business processes is occurring at a rapid rate as information technology skills and networks make the spread of digital information increasingly easy.



According to a survey conducted by Accenture (as cited in Hindle, 2003: 108), a particularly strong growth is currently taking place in the offshoring of the finance and accounting functions, positions that until recently were viewed as critical positions from an head office control point of view. The results of the survey indicate that the views of companies are changing from a perceived loss of control during the outsourcing of business processes, towards a change in the nature of the control.

2.6.3. Flexibility

The second trend identified by 21st Century Organisational Trends (author unknown) that will characterise companies during the 21st century is flexibility. Hellriegel et al (as cited in Robbins, 2003) predict that the 21st century company will be required to be much more flexible in its ability to adjust to constantly changing internal and external changes and developments.

This strong need for a much more dynamic and flexible work environment will be driven by the increasing diversity in the workplace, and the elevated tempo of change in technology and markets. The main focus of the change will be the fulfilment of differentiated customer needs. The extent to which the company is able to meet the customers' specific needs at any given moment in time will determine its competitive advantage in the global market place.

This strong need for flexibility will require organisational systems, processes, and employees that can respond quickly and appropriately to different situations. In order to facilitate this more flexible organisational approach, fewer detailed rules and procedures will be in place in the company. Employees will also be provided with greater autonomy, and encouraged towards higher levels of creativity and initiative (Robbins, 2003).



Hellriegel et al (as cited in Robbins, 2003) are also of the opinion that the relationship between employer and employee will change significantly in the globalised company. The employment relationship will be much more customisable, characterised by aspects such as telecommuting, job sharing, and a strong emphasis on payment for critical skills. The employee will be required to be much more flexible in an era of lifetime employability, as opposed to lifetime employment.

2.6.4. Flat organisational structures

According to 21st Century Organisational Trends (author unknown), globalisation is associated with increased competition, which has an immediate impact on the need to cut costs. In order to improve efficiency in the organisation, it is expected that management structures in the 21st century company will undergo significant changes. It is expected that the need for speed will lead to fewer differences in responsibility across hierarchical levels in the organisation. Fewer levels of management will empower employees to make decisions and display initiative. The communication and control functions of middle management will also be reduced as a result of improvements in information technology.

2.6.5. Direct communication and networking

Hellriegel (as cited in Robbins, 2003) indicates that definite changes will take place in the way that communication takes place in the 21st century company. These changes will be driven by new information technologies, as well as rapidly changing customer needs and competitor offerings. The expected increase in the complexity of the products and services offered by the company will also require an improved integration of the development, production, and marketing functions in the company.



According to Hindle (2003), the new information technology will facilitate direct communication to take place among employees across unit and organisational boundaries. In the process, formal chains of command may often be ignored. The tendency will be to move away from strong hierarchical organisational structures towards the utilisation of cross-unit and cross-department team structures.

2.6.6. Global and diversified workforce

In order to meet the increasingly complex human resources requirements in multinational organisations, indications are that an increasingly globalised labour market will also develop. According to Wessel (2004), the workforce in globalised companies will become more heterogeneous on a sexual, racial, cultural, and individual level. This more heterogeneous workforce will be the source of innovation, but also potential conflict or communication problems. This will require the ability to work with people from different backgrounds with different styles of communication, dress, interaction, and physical appearance.

Wessel (2004) asserts that the globalisation of people is the key aspect that will have an impact on a company's success in meeting the challenges of the global business environment. Wessel quotes a study conducted by the International Personnel Association, which found a positive relationship between a multinational organisation's ability to develop global leaders and the bottom-line success of the organisation.

Business leaders seem to agree with the results obtained from the above mentioned studies. Mr Jack Welch, the Chief Executive Officer of General Electric (Black et al, 1999) makes the following statement in this regard: *“The Jack Welch of the future cannot be like me. The next head of General Electric will be somebody who spent time in Bombay, in Hong Kong, in Buenos Aires. We have to send our best and brightest overseas and make sure they have the training that will allow them to be the global leaders who will make GE flourish in the future”*.



Similarly, Mr Larry Ellison, the Chief Executive Officer of Oracle Computers states: *“Isn’t it remarkable that right now Oracle employs 3 200 Indian citizens, paying constantly increasing salaries, providing a very high standard of living and helping to create a middle class? It will be even more remarkable when one of those 3 200 is running the company from her office in Bangalore. Don’t doubt it. That day is not far off”* (Hindle, 2003).

2.7. Summary

It becomes evident from the discussions in Chapter 2 that globalisation is here to stay, and that it has important implications for expatriates and their management. Cascio and Aguinis (2005) provide a good summary of the speed at which current developments are having an impact on the new global world: *“The global village is getting smaller every day”*. The extent to which companies will be successful in this new global village will to a large extent be dependent on their ability to adjust their corporate strategies and processes in line with the requirements of a much more complex and fast moving borderless market place. It also becomes clear that companies will need to manage an increasingly globalised labour force that will be much more heterogeneous in its demographics.

A detailed discussion was conducted on globalisation and the impact it has on the way business is taking place in the new borderless world economy. The various perspectives towards globalisation and the benefits or dangers associated with it were also taken into account. Within the framework of the new globalised world economy, a discussion was also conducted on the various development stages that companies go through in the process of internationalisation. As will become evident in the following chapters, the development stage within which a particular company finds itself has a significant impact on the approaches utilised by the company in selecting and managing its expatriates.



Chapter 3 Expatriates

3.1. Introduction

A key aspect having an impact on the success of organisations adjusting to the dynamic and complex globalised environment is the human resources these organisations employ in their various foreign operations, especially taking into account the expected increase in utilisation of expatriates by multinational companies. McCallum and Olson (2004) indicate that between 1.5 and 2 million Canadian citizens (5 to 6 percent) are currently living in other countries, while more than 4 million Americans live abroad in over 160 different countries. They also indicate an expatriation rate of 17.9 percent for the United Kingdom, and 4.3 percent for Australia.

Indications are that the number of people sent on international assignments may increase even further. McCallum and Olson (2004) quote the Association of Americans Resident Overseas, who indicates that 80 percent of all midsize and large companies in the United States make use of expatriates, and that 45 percent of these companies intend to increase the number they have on assignment overseas.

The above mentioned statistics emphasise the need for companies to consider their utilisation of their human resources on a much broader international scale in order to ensure success in the complex globalised business environment.

In Chapter 3 a detailed discussion is conducted on the use of expatriates, the approaches applied by international organisations in utilising expatriates, as well as the impact that failed international assignments have on both the organisation and on the individual.



3.2. Expatriate defined

The term “expatriate” is used continuously in this study. For clarification purposes, it is viewed important to obtain a sound understanding of the concept, as well as its applicability to the sample of individuals included in this research.

The Oxford Dictionary (1995) defines an expatriate as a person living or working abroad, especially for a long but limited period. Longman Concise Dictionary of Business English (Chan, 1999) defines an expatriate as “*a business employee, who has chosen to work and live in a place away from the country of which he is a national*”. According to (Chan, 1999), the concern with these two definitions is that they are too general, and are therefore not sufficiently specific or complete to be utilised in research on the topic.

Most definitions of expatriates used in human resource management literature provide a slightly more comprehensive and descriptive explanation. Cascio and Aguinis (2005: 440) define an expatriate as “*a generic term that is applied to any person who is working outside his or her home-country with a planned return to that or a third country*”. According to them, an expatriate can also be referred to as a foreign-service employee. They also include the term ‘third-country national’ in their description of an expatriate, which they define as a person who has relocated to another country on another assignment while working away from the home-country.

In line with the definition provided by Cascio and Aguinis, Briscoe (as cited in Chan, 1995) presents a definition for the overall expatriation process: “*Expatriation can be viewed as the process of moving from one country to another when staying on the payroll of the original employer. Therefore, this process can take many forms. At any particular location in the multinational firm, an individual manager may be a Third Country National and still be an expatriate from another country who is employed by and represents the parent company*”.



Van Heerden and Wentzel (2002) identify two categories of expatriates. The first type is referred to as ‘parent company or headquartered staff’ who are employees that may be seconded or transferred to foreign subsidiaries at some stage in their career with the objective of transferring skills to the local nationals employed at the subsidiaries. The intention is for these employees to return to the headquarters after a specific period of time. These employees could typically be utilised by the multinational company for long term assignments, short term assignments, and business travel.

Van Heerden and Wentzel (2002) refer to the second type of expatriate as ‘international staff’. These employees may start their careers with a multinational company from any country in the world, and have the ability to transfer their skills to any foreign subsidiary where they may be required in the company. These employees are also referred to as Third-Country-Nationals (Cascio & Aguinis, 2005; Beaverstock, 2000; Tung, 1987).

Within the framework of the above mentioned sources of expatriates, Runzheimer (2000) indicates that the most general job categories for expatriates are executive management (65 percent), sales/marketing (57 percent), engineer/scientist (44 percent), and technician/programmer (23 percent).

3.3. Duration of international assignments

According to a survey conducted by Van Heerden and Wentzel (2002), the average length of time spent by expatriates sent on international assignments by South African companies varies between two to three years. As can be seen in Table 3.1 below, the average length of the international assignments also seem to vary dependent on whether the assignment is in a first world country or in a third world country:

Table 3.1: Duration of offshore assignments

Duration of assignments	First World countries	Third World countries
One year	0%	11%
Two years	28%	19%
Three years	33%	41%
Four years	6%	4%
Five years	0%	4%
Varying periods of assignment depending on specific assignment requirements	33%	22%

(Van Heerden & Wentzel, 2002: 15)

Beaverstock (2000) describes three types of expatriate task roles:

- The structure reproducer is responsible for establishing a structure in a foreign subsidiary similar to that which he or she knows from another part of the company. The person may be responsible for creating a marketing framework, implementing an accounting and financial reporting system, or commissioning a production plant.
- The troubleshooter is the individual who is sent to a foreign subsidiary to analyse and deal with a specific operational problem.
- The operational manager typically performs the role of participant in an already existing operational structure.

A criterion that can be utilised to distinguish between these categories of expatriates is to identify the reasons why people elect to make themselves available to companies to be sent on international assignments to foreign countries, as well as why international companies employ individuals for international assignments.



3.4. Reasons for people becoming expatriates

Suutari (2003) identifies the following reasons for people wanting to become expatriates:

- The individual often shows an interest in working on an international assignment. The person's decision to become an expatriate is influenced by expected experiences and challenges associated with international assignments;
- International assignments are often associated with definite financial benefits. According to Suutari (2003), differences in cost-of-living and taxation practices across countries can have a considerable impact on the individual's standard of living. McCallum and Olson (2004) agree that financial incentives play a significant role in attracting individuals to international assignments. According to them, one of the primary factors taken into account by the prospective expatriate is the extent to which his overall living situation will be affected by the specific assignment;
- Personal development through the availability of challenging jobs in foreign countries is often viewed as a central consideration in the expatriate's decision to consider going on an international assignment (Suutari 2003). A study conducted by Black et al (1999) confirms this observation, indicating that candidate expatriates with a Masters degree in Business Administration (MBA) ranked personal growth and gaining a cross-cultural experience as the main reason why they would accept international assignments;
- Prospective career development opportunities are often considered as critical factors in the expatriate's decision to accept an international assignment (Suutari, 2003). According to Black et al (1999), prospective expatriates ask themselves two fundamental career questions when considering an offer to go on a global assignment: Will this assignment place me in a strategic business role?, and Will this assignment lead to my advancement? Taking into account that the average global manager has more than fourteen years of experience in their parent companies, they want to be certain that an overseas assignment does not leave them out-of-sight and out-of-mind.



Commenting on the above mentioned reasons for individuals considering expatriation, McCallum and Olson (2004) assert that organisations are required to effectively meet the needs of expatriates who have different expectations about international assignments compared with their predecessors. They view international assignments as advancement opportunities for longer term career growth and development. As a result, companies are in the process of moving away from haphazard and unplanned assignments. Instead, international assignments are viewed as strategic tools that can be employed in achieving career and business development opportunities in line with the strategic direction and objectives of the company.

3.5. Reasons for multinational companies making use of expatriates

In the previous investigation, the emphasis was placed on the reasons that influence a person to accept or refuse an offer for an international assignment in a foreign country. However, an equally important point of discussion would be the reasons why companies elect to make use of expatriates and international assignments.

The traditional approach utilised by companies was to send employees with particular expertise to their operations abroad with the purpose of fulfilling specific technical responsibilities (Stoltz-Loike; 2002; Jagatsingh, 2000). Expatriates were either used on long term assignments for managing specific business ventures or projects, or they were sent on shorter term assignments with the purpose of transferring specific skills to the local nationals. Minimum attention was given to the skills and knowledge gained by these expatriates while employed at the foreign operations, or the impact the assignment would have on the expatriate's longer term career.

Research indicates that this traditional perspective towards expatriates being sent on international assignments has changed significantly. A survey conducted by Van Heerden and Wentzel (2002: 15) identified eight key reasons why South African companies make use of expatriates for international assignments. These eight reasons are presented in Table 3.2:

Table 3.2.: Reasons for companies utilising international assignments

Reasons for Assignments	% Responses Received
Business expansion reasons	16%
Knowledge and technology transfer	16%
Managerial skills shortage in host-country	14%
Technical skills shortage in host-country	14%
To represent the home-country	12%
To establish a specific company culture in subsidiaries	11%
Career development of employees	10%
Company retention strategy	7%
Total	100%

(Van Heerden & Wentzel, 2002: 15)

Swaak (1995) classifies assignments as follows based on their specific purpose:

- Assignments to develop specific skills and talents;
- Short- and long-term assignments where specialists are utilised to carry out specific duties, and then to transfer such skills and knowledge to the local nationals;
- Project assignments, where specialists are sent on short-term assignments in order to develop and implement specific plans and projects, and then to return to the parent company or be sent on other expatriate assignments;
- Long term or permanent assignments, where interested individuals are sent on assignments for periods of two years and longer. These expatriates may then elect to remain in the host country as local employees on completion of their assignments;
- Management assignments, where senior executives oversee and control an overseas subsidiary in order to provide stability in an operation;
- Regional coordination assignments, where specialists who excel in managing local operations oversee and integrate various countries in a region;
- Worldwide management assignments, where global career executives oversee and integrate the activities of different regions.



Edstrom and Galbraith (as cited in Beaverstock, 2000) suggest that international assignments are utilised by trans-national companies for one of three main reasons, namely: employment into key positions, development of management skills, and organisational development. These three reasons correspond with the motives identified by Kozloff (1996) for companies utilising expatriates, which will now be discussed:

- **Co-ordination and control:** From an organisational perspective, one of the reasons for utilising expatriates on international assignments is focused on the need of companies to control and integrate their international business ventures (Kozloff, 1996). According to Beaverstock (2000), trans-national corporations typically utilise expatriates to support the strategic focus areas of the business. The rationale for the expatriate appointment would therefore be to manage and coordinate the achievement of the corporate business objectives.
- **Transfer of corporate culture and values:** Perkins (1997:62) suggests that *"organisations ... need to develop a 'corporate memory', setting down in a structured and formal way 'best practice', so these can become common practices"*. The foundation for Perkins' assertion in this regard is that expatriates are used as an organisational mechanism to transfer 'corporate memory', or "valuable project knowledge and expertise" to the local operations.
- **Technology and information transfer:** As a result of advances in transportation and communication technology, companies are expanding into an increasing number of countries across the world. The coordination of developments and activities in such countries require the skills of appropriately competent expatriates. An important role of the expatriate in this regard is to transfer the technology developed in other parts of the world into the local environment in an efficient and culture-friendly way (Frandsberg & Kjellman, 2005). According to Bender and Fish (2000), the focus of the multinational organisation should be to move towards a global model of information management, where knowledge and ideas are shared and incorporated among the organisation's subsidiaries worldwide.



- **Management development:** International assignments are increasingly being viewed by companies as a valuable instrument for developing global leaders in the organisation (Suutari, 2003). In order to develop the required global skills among their employees, trans-national corporations utilise international assignments as an instrument to enhance the career development opportunities for employees.
- **Developing cross-cultural organisational capabilities:** For companies to develop culturally successful business strategies on a global basis, it is of critical importance for the people that drive and implement these strategies to have international experience. Managers with international experience are more likely to make strategic decisions that reflect valuable knowledge concerning foreign customers, as well as the social, political, legal, and economic systems in the company's markets. The only way these managers will be able to gain such knowledge and information on the foreign markets would be to expose them directly to the work and living conditions in the particular country (Frandsberg & Kjellman, 2005).

3.5.1. Summary

As can be seen from the above mentioned discussions, companies have very specific reasons why they make use of expatriates for international assignments. Kubes and Loh (2006) strongly assert that the reasons why companies utilise expatriates in foreign operations need to be investigated in exactly the same way as any other company investment, with the emphasis being placed on the international assignment's capacity to add value to the company's business. According to Kubes and Loh (2006), the company must have a very clear understanding of why, how, and where each specific international assignment is utilised, as well as the extent to which it is aligned with the strategic business purpose of the organisation.



3.6. Approaches to expatriate staffing

One of the more challenging issues facing multinational companies is the correct staffing of the foreign operations. According to Treven (2001), multinational companies typically make use of five different approaches in selecting the appropriate employees to represent them in the foreign subsidiaries, namely:

- **The Ethnocentric approach:** According to Treven (2001), the underlying objective of an ethnocentric staffing approach is for all key management positions in the foreign operations to be filled by parent-country nationals - employees who are relocated from the company's headquarters in the parent-country to foreign operations in the host countries. Multinational companies typically make use of parent-country nationals to maintain and facilitate organisational control and coordination in the international subsidiaries. The company would transfer the best technically and managerially competent employees available who are familiar with the head office's strategic objectives, policies and practices to off-shore subsidiaries. This is done to effectively transfer business and management practices from the headquarters to the subsidiaries. By making use of parent-country nationals, the company is in a stronger position to exert control over the operations and functioning of subsidiary. The company is also able to ensure that the subsidiary adheres to the company strategies and policies (Frandsberg & Kjellman, 2005).
- **The Polycentric approach:** The polycentric staffing approach is utilised where host-country nationals are appointed to manage the operations in the foreign country, and parent-country nationals fill the senior management positions at the parent company head office (Frandsberg & Kjellman, 2005). The multinational company may typically employ the polycentric approach of appointing host-nationals to be perceived as a local company as part of a local responsiveness strategy. In some cases the company may not have much of a choice than to make use of the polycentric policy due to the fact that the host government may dictate that key managerial positions be filled by its nationals.



- **The Regiocentric approach:** A third approach to international staffing is the regiocentric policy, which Treven (2001) defines as the functional organisation of the business processes on a more-than-one country basis. An example of the regiocentric approach would be a multinational company that divides its operations into geographical regions, and employs, develops, and transfers staff within these regions.

A key reason for making use of a regiocentric approach is that it facilitates the interaction taking place between local national executives transferred from operations in the region to regional head office, and executives transferred from the parent company to the regional headquarters. This approach also shows some level of sensitivity towards local conditions in the host-country, as almost all the positions at the local operations are filled by host-country nationals. A further advantage is that a regiocentric approach can be utilised as a transitional step where the multinational organisation wishes to develop from a purely ethnocentric or polycentric approach to a geocentric approach (Treven, 2001).

- **The Geocentric approach:** In the geocentric staffing approach, the most competent employees are appointed in the key positions throughout the organisation, irrespective of their nationality (Treven, 2001). Dowling indicates that there are two main advantages to the geocentric approach: It eliminates the "federation" restrictions associated with the polycentric approach, and it enables a multinational firm to develop an executive team with international experience.

In the geocentric approach, multinational companies may at times employ third-country nationals at their foreign operations (Carrel et al, 1998). Third-country nationals are external individuals who are appointed into management positions at the company's foreign operations on the basis of their technical expertise and their experience of managing foreign operations as expatriates. They are often people who have become professional expatriates and who accept international assignments at different companies as they become available (Black et al, 1999). Third-country nationals may also have worked in the specific foreign country previously and would therefore have a better understanding of the local culture and practices.



- **The Ad hoc approach:** As opposed to systematically selecting the most appropriate option from the above mentioned approaches, a multinational company may merely proceed on an ad hoc basis in selecting its executive staff in foreign operations. This option could also be referred to as a policy by default, as no conscious decision is made in selecting the ad hoc policy. According to Dowling et al (1999), the ad hoc approach is often a result of a lack of corporate interest, inexperience, or both.

The major drawback associated with the Ad hoc approach is that the multinational company will tend to make inefficient use of the human resources available in the organisation. A further definite disadvantage is that the company is poorly placed to either anticipate threats or profit from opportunities in its external environment. With an ad hoc staffing approach in place, the responses of a multinational company to external developments tend to be reactive rather than proactive, and a consistent organisational human resources strategy that fits the overall business strategy of the organisation is difficult to achieve (Chan, 1999).

3.7. Factors that impact the choice of staffing approach

According to (Treven, 2001), it is possible for combinations of the above mentioned staffing approaches to be applied in the multinational organisation, dependent on factors in both the internal and external environment within which it is functioning.

As a result of changes in the environment within which the organisation is functioning, the multinational company is required to make constant changes to its business strategies. These changes in business strategy have a direct impact on the organisational structures in place, which in turn have an impact on the decisions made related to human resources in the company. Several human resource management variables (for example employee availability, time and cost restrictions, interference by host governments, etcetera) also need to be taken into account which influence the choice of staffing approach utilised in the multinational company (Treven, 2001).



The choice of an appropriate policy on executive nationality at the foreign operations tends to be a reflection of the organisational needs (Dowling et al, 1999). An example in this regard would be if the organisation places a high priority on organisational control, an ethnocentric policy will be adopted. Multinational companies who wish to internationalise management and the company's products would prefer making use of a regiocentric or geocentric policy.

From a more practical perspective, a study conducted by Ondrack (as cited in Chan, 1999) found that multinational companies prefer making use of either local nationals or parent-country nationals. Third country nationals are only employed as a last resort if the appropriate skills are not available inside the organisation. Ondrack also found that all the multinational companies included in the study applied a combination of the geocentric approach to coordinate certain centralised control functions (for example financial control and executive management), and a more decentralised poly/regiocentric approach in managing market-oriented functions (for example sales and human resources).

3.8. Expatriate failure

One of the most challenging issues facing these multinational firms is the management of the human resources required to ensure the successful management of their diverse international interests. The cost of sending people overseas on international assignments is estimated at around one million rand per year for a three-year assignment for expatriates in executive positions. A definite concern in this regard would be the results obtained from research literature, which indicates that expatriate failure is a continual and persistent problem experienced by multinational companies (Trompenaars & Hampden-Turner, 2004; Van Heerden & Wentzel, 2002; Schumacher, 2000).

In order to ensure a sufficiently accurate discussion of expatriate failure and the costs involved, it is important to clarify exactly what is meant by the concept.



3.8.1. Expatriate failure defined

A commonly accepted definition for expatriate failure is the “*premature return or recall of an expatriate to the home-country before the period of assignment is completed*” (Bampton, 2003; Vermeulen, 2002; Treven, 2001; Morley et al, 1997; Dowling et al, 1999). In line with the above mentioned definition, Harzing (1995) indicates that most research publications define and measure expatriate failure as “*the percentage of expatriates returning home before their assignment contract expires*”.

Some disagreement seems to exist among researchers on the usefulness of describing expatriate failure in such a narrow way as specified in the above mentioned definition. Dowling et al (1999) argue that an expatriate may be ineffective and may experience difficulty adjusting to the environment in the foreign country. However, his contract may not be terminated by the company. If the manager is experiencing difficulty coping on a cultural level, the performance of the business unit will be affected, which may result in low morale among host-country nationals or dissatisfied clients. Within the framework of the above mentioned definition of expatriate failure, such an individual will not be viewed as a failure, despite the damage he or she will be doing by remaining on the contract. Taking into account the above mentioned discussion, Dowling et al (1999) are of the opinion that the return rate can not be considered as being the ideal measure of expatriate success or failure, and that it may underestimate the real extent of the problem.

A more comprehensive definition of expatriate failure is presented by Black and Gregersen (2006), who propose that “*expatriate failure can be defined in terms of early return home or termination*”. However, they add that the following areas need to be incorporated into the definition of expatriate failure:



- Poor performance while on international assignment;
- Personal unhappiness and frustration experienced by the expatriate and/or his/her family with the international assignment;
- An inability to adapt to the living and work conditions in the foreign country;
- Poor relations with local employees, government officials, customers, suppliers, etc.

In a study conducted by Latta (2004) among multinational companies, the definitions of assignment failure most commonly identified by the participants were:

- Early return before contract expires: 72 percent;
- Inability to meet business objectives: 71 percent;
- Adjustment problems experienced by expatriates at the foreign operations: 49 percent;
- Inability to meet career development objectives: 32 percent.

Despite its limitations, the most common definition used for expatriate failure is that the expatriate is unable to perform effectively in the international assignment, and returns to the home country before the expiry of his international assignment contract (Vermeulen, 2002; Yavas, 2001, Chan, 1999). This definition is also generally utilised by researchers and multinational companies to calculate actual expatriate failure rates, and to highlight the problems encountered in staffing overseas subsidiaries with parent-country nationals and third-country nationals.

3.8.2. Expatriate failure rates

An annual survey conducted by Van Heerden and Wentzel (2002) indicates that 12 out of the 30 South African companies included in the survey experienced turnover of expatriates during the period 1 June 2001 to 31 May 2002. A total of 21 expatriates left service at their own choice, which indicates a 9 percent turnover in the average number of assignees lost in the twelve companies concerned. Seven companies participating in the survey (23 percent) experienced “failed and returned” expatriates during the period 1 June 2001 to 31 May 2002. A total of 20 assignees returned to the home company. All of these 20 expatriates were placed on international assignments in third world countries.

These statistics indicate that South African companies are experiencing significant difficulty in managing the failure rates of their expatriates. The statistics seem to be in line with international statistics.

According to Treven (2001), the proportion of American expatriates who fail in their global assignments and return prematurely ranges from 20 percent to 40 percent, with the higher rates associated with assignments in underdeveloped or developing countries. Yavas (2001) agrees with Treven, asserting that the failure rate among expatriates who are sent on international assignments to underdeveloped countries can be as high as 70 percent. Beaverstock (2000) suggests that it has been *"estimated that between 20 to 50 percent of personnel sent abroad return prematurely from their overseas assignment"*.

One of the earliest empirical studies on expatriate failure rates was conducted by Tung in 1982 (Beaverstock, 2000). This study surveyed a number of multinational companies from the United State of America, Europe, and Japan. As can be seen in Table 3.5 below, all the multinationals included in the study reported significant expatriate failure rates.

Table 3.3.: Expatriate failure rates

Recall Rate Percentage	Percentage of Companies
U.S. Multinationals	
20 – 40	7%
10 – 20	69%
< 10	24%
European Multinationals	
11 – 15	3%
6 – 10	38%
< 5	59%
Japanese Multinationals	
11 – 19	14%
6 – 10	10%
< 5	76%

(Tung as quoted by Beaverstock, 2000)



Tung (as cited in Carrell et al, 1998) also found that the expatriate failure rates for companies from the United States of America were higher than the rates for European and Japanese companies. Morley et al (1997) confirm Tung's findings in this regard, indicating that the failure rates among European companies tend to be lower compared to those of multinational companies from other nationalities. Their explanation for this difference is that European companies tend to prepare and manage their expatriates better than their counterparts in America. They also argue that European companies are willing to accept lower performance standards than American companies before taking action to remove their expatriates from their assignments.

From the above mentioned observations, it becomes evident that expatriate failure is a serious problem experienced by multinational companies across the world, especially taking into account the cost implications of an expatriate's premature return for both the company and the individual.

3.8.3. Costs of expatriate failure

An expatriate's early return from international assignment is expensive for both the company and the individual concerned. Internationally, the direct costs associated with a failed overseas assignment can vary between US\$200 000 (R1.5 million) and US\$1.2 million (R9 million) (Schapira et al, 2005; Luthans & Farner, 2002). These costs will increase even further if the failed expatriate's actions have caused damage to an overseas business operation. Additional expenses will also be incurred if another parent-country national is sent to replace the failed expatriate at the foreign operations.

Black et al (1999) indicate that the costs involved with expatriate failure can be divided into eight categories. Herewith, a more detailed discussion on each of these categories.



- **Failed assignments:** The costs involved with sending a manager on an international assignment are three to five times what it would cost to employ the same manager domestically (Melles, 2005). Van Heerden and Wentzel (2002) indicate that the costs associated with expatriate failure for South African companies range from R500 000 to R1.5 million per assignment. Typical costs associated with expatriate failure usually include remuneration, accommodation, training, and travel and relocation expenses. In the case where the expatriate does not complete his assignment, a substantial part of the money spent by the company on the expatriate is lost.
- **Direct moving costs:** The most direct costs of failed assignments are those associated with the physical transport and movement of the expatriate (Van Heerden & Wentzel, 2002). Black et al (1999) indicate that it is very expensive to relocate an expatriate and his family and belongings overseas. They calculated that a typical transfer to Tokyo from the United States might cost US\$75 000 (R562 500). These costs would include US\$8 333 (R62 500) relocation allowance, US\$19 000 (R142 500) temporary living costs, US\$14 000 (R105 000) brokers' commission, US\$11 000 (R82 500) one-way travel to Japan, US\$20 000 (R150 000) moving costs, and US\$3 000 (R22 500) property management. It would cost approximately a further US\$60 000 to US\$70 000 (R450 000 to R525 000) to return the expatriate and family back to their home-country, plus an additional US\$75 000 (R562 500) to send a replacement. Based on these calculations, the relocation costs alone can therefore be more than US\$220 000 (R1.65 million) for a failed assignment.
- **Costs as a result of non-productive time:** During the expatriate's pre-departure preparations, the individual typically goes through a transitional period where he or she receives a full salary and expatriate benefits but is not capable of fully performing his duties (Schapira et al, 2005). On his arrival on the international assignment in the foreign country, the individual also typically goes through a phase of adjusting to the new culture, the environment, and the new position. These periods are often referred to as "down-time". Schapira et al (2005) view these down-time periods as normal in the expatriate's integration process into the foreign environment.



Unlike expatriates who recover, adjust to, and perform well on their international assignment in the foreign country, those who fail provide no long term return on the downtime. A further concern highlighted by Yavas (2001) is that, on the expatriate's arrival in the foreign country, all the additional benefits received (for example foreign service premium, housing allowance, education allowance, cost-of-living differential, tax-adjustment allowance, etcetera), usually at least double the person's total compensation package. These expenses in turn double the cost of the adjustment downtime, for which there is no long-term return in the case of a failed assignment.

- **Indirect costs:** Schapira et al (2005) assert that the indirect or "invisible" costs associated with expatriate failure are more difficult to calculate in financial terms. However, these indirect costs can prove to be much more expensive for the company, depending on the expatriate position involved. Schapira et al calculate that the costs associated with expatriate failure range from US\$200 000 (R1.5 million) to US\$1.2 million (R9 million) per assignment. According to Schapira et al (2005), these costs only reflect directly identifiable expenses, such as compensation, training, orientation, development, and termination. These costs could easily be twice as high if indirect and hidden costs associated with failure and underperformance were included.

From an individual point of view, expatriate failure also has a directly negative impact on the well-being of the expatriate and his family. Taking into account the fact that the cost involved with sending an expatriate on an international assignment is typically three times it would have cost to appoint a person in an equivalent position in the parent company, a failed assignment has the potential to have a seriously detrimental impact on the expatriate's career (Black & Gregersen, 2006). A failed assignment can also lead to the expatriate experiencing a serious loss of self-esteem, loss of reputation among colleagues, and a serious setback from a promotional opportunities perspective.



- **Underperforming expatriate managers:** Black et al (1999) use the term “brownouts” to identify expatriate managers who do not return prematurely from their assignments, but who are nevertheless ineffective in performing and executing their responsibilities. They estimate that between 30 percent and 50 percent of all expatriates fall into this category. Schapira et al (2005) assert that managers who do not perform well on international assignments often do not provide an adequate return of investment for the multinational company. These managers may initiate inappropriate programmes or projects that cost time and money, and they may damage relationships with locals that are difficult to repair. They may also cause high-potential local managers identified for empowerment and future appointment into senior positions to leave the organisation.
- **Turnover after repatriation:** Repatriation is often the least considered aspect of global assignments. However, it could also be the most costly (Cascio & Aguinis, 2005; Black et al, 1999). Research indicates that approximately 25 percent of managers resign from their companies within one year after their return to the parent company. Aoun (2006) goes so far as to assert that up to 70 percent of overseas assignees change employers when their assignment is completed. Kubes and Loh (2006) indicate that multinational companies on average spend US\$150 000 (R1.125 million) to US\$250 000 (R1.875 million) on all the expenses (salary, allowances, etc.) for an expatriate per year. For the average four-year assignment, the typical US firm invests from US\$1 million (R7.5 million) to nearly US\$3.5 million (R26.25 million) per manager. This investment is especially important if the expatriate has been identified for succession planning and accelerated management development.



- **Downward-spiralling vicious cycles:** Black et al (1999) assert that an interaction among all the aforementioned costs associated with expatriate failure have the potential to create circumstances that set in motion a downward-spiralling cycle, which may lead to a serious erosion of the company's global advantage. Failed global assignments, rumours of "brownouts", and turnover among repatriates can lead the best and most competent people in an organisation's worldwide operations to view international assignments as being potentially detrimental to their careers. This reputation makes it difficult to recruit and send top-quality candidates on international assignments, which in turn increases the likelihood of more failures. This downward spiralling quality of candidates and performance can feed on itself, gaining momentum as the process continues.
- **Erosion of executive capability at the parent company headquarters:** Kubes and Loh (2006) indicate that potentially the most dangerous consequence of the above mentioned vicious cycle would be a shortage of leaders who have vital understanding and experience in the global arena. This lack of international experience can result in poor strategic management and a negatively impacted competitive position globally. This mismanagement ultimately leads to a loss of competent managerial potential, which is a fatal flaw for globalisation. Without international experience, executives are unable to formulate and implement global strategy accurately.

3.8.3.1. Summary

As can be seen from the aforementioned discussions, expatriate failure is very costly and can have a substantially detrimental impact on the competitiveness and success of the organization. Given the high failure rate among expatriates and the costs associated with expatriate failure as discussed so far, it is critically important to accurately identify the reasons why expatriates who are sent on international assignments to foreign countries fail (Kubes & Loh, 2006).



3.8.4. Reasons for expatriate failure

A number of studies have been conducted in South Africa and internationally to investigate the reasons why expatriates who are sent on international assignments fail.

According to Hawley (1995), the most common reasons for South African expatriates failing to complete their international assignments in other African countries are:

- a poor understanding of the local culture and language;
- an unwillingness to train and empower the local nationals;
- insufficient preparation and counselling of the expatriate and his/her family before their departure on assignment;
- ethnocentrism where the expatriate may have the attitude that his/her own culture is superior to that of the host nation.

A survey conducted with South African companies involved with expatriation indicated the following main reasons for failed assignments (Van Heerden & Wentzel, 2002):

- Personal reasons : 62 percent
- Health considerations : 10 percent
- Performance-related matters : 28 percent

In the above mentioned statistics, only 28 percent of the reasons for expatriate failure can be attributed to the individual's technical competence and actual performance in the work environment. The vast majority of the reasons for failure (62 percent) were associated with personal factors relating to inter alia the expatriate's spouse or family, or his personal and living environment external to the job.



The results obtained from studies conducted in South Africa on expatriate failure seem to correlate well with international findings. Brotchi and Engvig (2006) identify the following factors as the key reasons for expatriate failure (in descending order of importance):

- inability of spouse to adjust to the living conditions in the foreign country,
- expatriate's own inability to adjust to the foreign environment,
- impact of the expatriation process on the family,
- expatriates' levels of emotional maturity,
- expatriate's inability to cope with pressure associated with managing larger overseas responsibility.

Similarly, Van Weerdenburg (2006) identifies three primary reasons why employees who are sent on international assignments fail, namely:

- their families are misjudged, or are not even considered at the time of selection;
- expatriates are selected based on their domestic track record;
- expatriates lack adequate cross-cultural training.

A major reason for the high expatriate failure rates experienced by multinational companies is the inadequate selection criteria and procedures utilised during their selection of candidates for international assignments (Van Weerdenburg, 2006).

Van Weerdenburg (2006) argues that most international companies still focus their efforts during their selection of candidates for expatriation solely on two criteria, namely technical ability and willingness to go on an international assignment. Similarly, a PriceWaterhouseCoopers survey (as cited in McNulty, 2004) indicates that the most popular expatriate selection criteria utilised by 270 international companies are:



- Job-specific and technical skills
- Leadership skills
- Career development opportunity for the employee
- Language ability
- Ability of family to adjust to living conditions in the foreign country
- The employee's ability to effectively interact with people from other cultures

Interestingly, the following criteria were listed as being the least important during the selection of candidates for international assignments (McNulty, 2004):

- Ability of the spouse to effectively interact with individuals from other cultures;
- The educational needs of the children;
- Emotional maturity and resilience;
- The impact of the international assignment on the spouse's career, and
- The suitability of the individual and the family from a lifestyle perspective.

The above mentioned criteria were also found the most common reasons for expatriate failure.

Research carried out on South African companies indicates very similar results. A survey conducted on South African companies making use of expatriates (Van Heerden & Wentzel, 2002) found that only 48 percent of the survey participants apply proper selection processes on future expatriates prior to assignments. Of the above mentioned 48 percent, only 29 percent of the participants focus on aspects other than technical or managerial competence during their selection of future expatriates.

The consequences of multinational companies applying such a haphazard and non-scientific approach in selecting expatriates for international assignments can be severe and wide-ranging and very often lead to expatriate failure. Cascio and Aguinis (2005) are of the opinion that the lack of appropriate expatriate selection processes is one of the reasons for the high failure rate of American expatriates.



3.9. Summary

In Chapter 3 an investigation was conducted into the nature of expatriates, the various categories of expatriates, as well as the staffing approaches employed by international organisations when sending expatriates on international assignments.

The consequences and cost implications involved with failed international assignments were also considered, as well as the reasons why so many international assignments end in failure. The discussion on the reasons for expatriate failure forms an introduction to the investigation that will be conducted on the impact of the various phases of the international career cycle on expatriate success.

From the above mentioned discussions it becomes evident that the dynamics involved with the management of expatriates for international assignments are significantly more complex when compared to the demands within a domestic human resource environment. In Chapter 4, the expatriate international career cycle will be investigated, with specific reference to pre-departure preparation and selection.

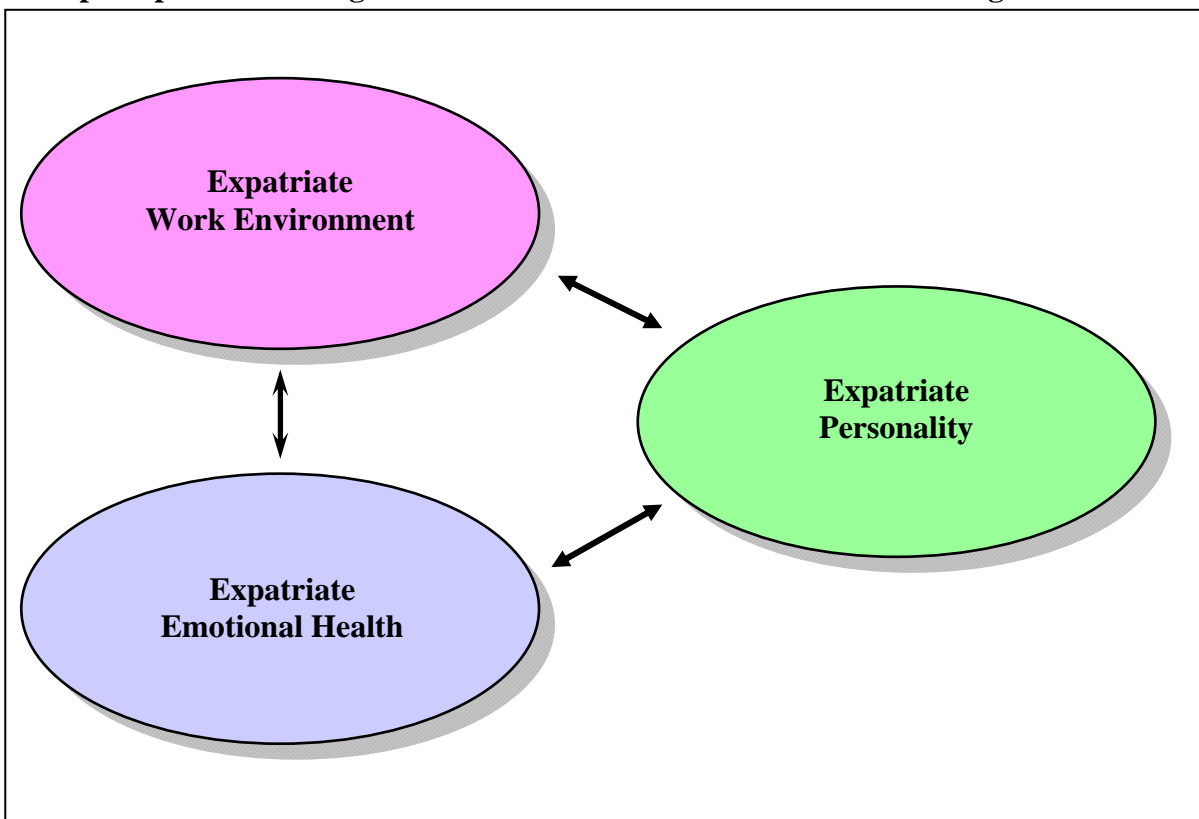
Section 2

Individual adjustment to the expatriate international career cycle

Overview

The aim of the study is to determine whether relationships exist between the expatriates' levels of emotional health, personality, and their perception of the organisational climate while on international assignment, and to present the outcomes of the study as a model. A graphical layout of a potential model that displays the interaction among the three factors is presented below:

Figure 4.1: Possible relationships among expatriate emotional health, personality, and perception of the organisational climate while on international assignment





The specific research objectives set during this study are the following:

- Objective 1: To establish the impact of the expatriation process on the individual's emotional health;
- Objective 2: To establish the interaction that exists between the expatriate personality and the individual's emotional adjustment during the various phases of the expatriation process;
- Objective 3: To establish the impact of organisational climate factors on the emotional adjustment of the individual prior to departure on the international assignment, and while on contract;
- Objective 4: To establish the nature of the interaction that exists between the expatriate personality and the individual's perception of the organisational climate.
- Objective 5: To investigate the main personality and organizational climate predictors of the expatriate's levels of emotional health while on an international assignment in a foreign country.

In order to achieve the above mentioned aim and its accompanying objectives, it is of critical importance to conduct a detailed investigation into the three variables that may potentially be included in the proposed model as displayed in Figure 4.1.

In Section 2 the theoretical and academic foundations of expatriation are discussed, with specific reference to the organisational climate dynamics involved with the expatriate international career cycle, emotional health, and personality.



Chapters 4 to 7 are included in Section 2. The contents of these chapters are as follows:

Chapter 4 concentrates on the first phase of the expatriation process, namely the period before departing on international, which includes selection and preparation of the expatriate.

The complexities and difficulties experienced by the expatriate while on the international assignment (the second phase) are explored in Chapter 5.

Chapter 6 entails the last phase of the expatriation process, namely the expatriate's repatriation back in the home country and parent company on completion of the international assignment.

Specific attention is given in all three chapters to the impact of the work environment on the expatriate during the various phases of the international assignment.

Chapter 7 focuses primarily on the applicable academic research that provides the underlying foundation for expatriate psychological health and personality as investigated in this study. The chapter provides the theoretical basis for the research methodology that will be applied. The emphasis shifts to the individual expatriate and his adjustment to the expatriate environment from a psychological health perspective. This is done within the framework of the salutogenic model of psychological health as established by Dr Aaron Antonovsky, with specific reference to the concepts of sense of coherence and hardiness as "internal or personal protective factors" utilised by the expatriate in coping and remaining healthy in the stressful and constantly changing expatriate environment.

The qualitative literature research discussed in Section 2 of this study forms the conceptual framework for the quantitative statistical analyses and investigations that are conducted in Section 3.



Chapter 4

Pre-departure preparation prior to international assignment

4.1. Introduction

Postulate 1 set in this study was that the emotional health of the individual expatriate is significantly and negatively influenced during the three phases of the international career cycle. The international career cycle consists of three phases, namely pre-departure on international assignment, the actual period abroad, and repatriation back to the home country. Chapter 4 provides a detailed investigation into the various phases of the expatriation process (jointly referred to as the international career cycle), with specific reference to the first phase of the cycle: the effective identification, selection, and preparation of suitable individuals prior to their departure on international assignments to foreign countries.

4.2. Expatriate international career cycle

Expatriates progress through a predictable sequence of phases in relocating from a domestic position in the parent company to an international assignment, and back home again on completion of assignment. Three phases can be identified in the international career cycle (Brotchi & Engvig, 2006):

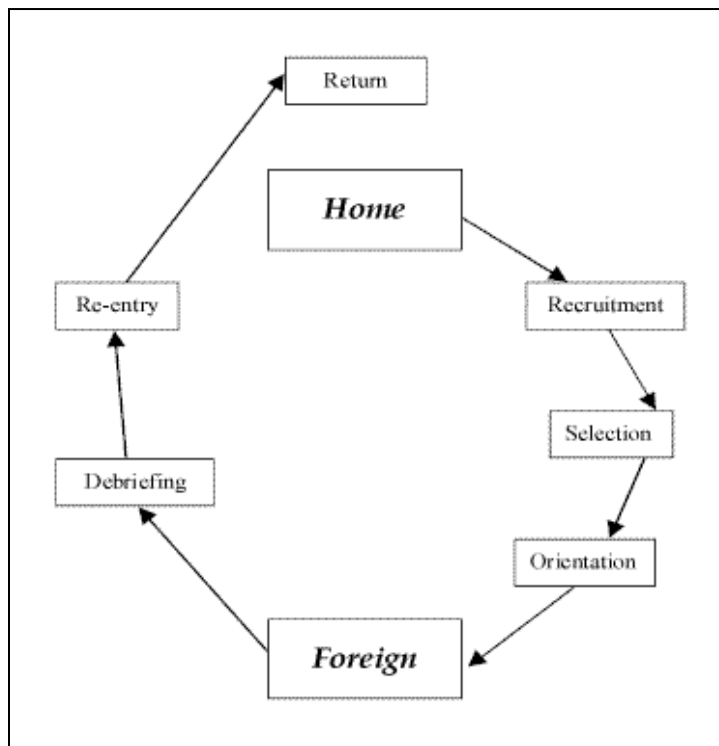
- Pre-departure preparation prior to international assignment
- the actual period abroad, and
- repatriation or transfer

A full expatriate career cycle consists of two key international transitions: cross-cultural entry into the host country, and re-entry into the home country on completion of assignment (Chan, 1999). Each of these transitions has a significant impact on the expatriate. Locals in certain African countries refer to expatriates sent on two-year assignments as “two-year wonderers”:

“For the first six months they are full of wonder at their new environment and think everything is great and exciting. Then follows one productive year during which they may provide modest value to the organisation and the business. For the last six months of their stay they are wondering where they will go next” (Shelley, 2004: 42).

In order to ensure maximum benefit of the international assignment in achieving the organisation’s strategic goals, Frandberg and Kjellman (2005) assert that the expatriate career cycle should be treated as an overall process. The cycle progresses through certain predictable phases. It starts with the selection of a suitable candidate for an international assignment, and then the preparation of the expatriate and the family for the assignment. It then progresses through the full period of assignment at the foreign operations, and ends with the reintegration of the returning expatriate into a new position in the parent company on repatriation. The full expatriate international career cycle can be viewed in Figure 4.1.

Figure 4.2.: Expatriate international career cycle



(Antal, 2001)



A detailed review follows on each of the above mentioned phases in the expatriate international career cycle.

4.3. Pre-departure preparation prior to international assignment

The process of pre-departure preparation prior to international assignment can be divided into two interrelated phases, namely anticipatory adjustment, and selection and preparation (Frandsberg & Kjellman, 2005; Dowling et al, 1999).

- **Pre-departure anticipatory adjustment** entails the expatriate's psychological adjustment of his mental maps and rules in line with the expected conditions in the foreign country.
- **Selection and preparation** entails the identification, selection, and preparation of the expatriate prior to his expatriation on international assignment. It also includes the planning ahead for the future and conducting investigations to obtain relevant information on the international assignment at the foreign operations.

4.3.1. Pre-departure anticipatory adjustment

The pre-departure anticipatory adjustment phase is often the most important, but also the least understood and most poorly managed phase in the repatriation process. Future expatriates do not always realise the extent and impact their perceptions and expectations of the conditions at the foreign operations could have on their future adjustment to the work and living conditions in the host country Hodgetts and Luthans (2003).

Hodgetts and Luthans (2003) identify two pre-departure processes that are of critical importance in the future success of the expatriate in the foreign country, namely anticipatory adjustment and anticipatory expectations.



According to Hodgetts and Luthans (2003), people make anticipatory adjustments in advance of actually going on the international assignment. They emphasise that, in order to be successful, the expatriates should really want to go on the international assignment, which means that they may even have unrealistic expectations and ideals. Only individuals who display high levels of enthusiasm and personal commitment would be willing to make the level of sacrifice required to obtain an in-depth understanding and acceptance of the conditions in the host country.

Hodgetts and Luthans (2003) assert that the expatriate needs to have a desire to go on a foreign assignment in order to make the necessary anticipatory adjustments in advance of the assignment. According to Suutari and Brewster (1997), the process of anticipatory adjustment is primarily psychological in the sense that people begin to adjust their mental maps and rules in line with the expected conditions in the foreign country. These mental maps and rules are also referred to as anticipatory expectations.

Hodgetts and Luthans (2003) identify three aspects of anticipatory adjustment that are of value during the expatriate's adjustment on arrival in the foreign country:

- The person is allowed to make a large number of mental adjustments in advance;
- The process of anticipatory adjustment is focused on important aspects of the new culture, and;
- The future adjustments are refined so that they are accurate and reflective of the actual conditions in the foreign country.

Two factors are identified that lead to the formation of accurate anticipatory expectations and mental adjustments prior to the expatriate's departure to the foreign country, namely individual factors and organisational factors (Hodgetts & Luthans, 2003).



4.3.1.1. Individual factors

As elements of anticipatory adjustment, two specific individual factors are identified that facilitate the formation of accurate expectations and mental adjustments, namely: cross-cultural training, and previous overseas experience (Hodgetts & Luthans, 2003; Chan, 1999; Suutari & Brewster, 1997).

i. Cross-cultural training

The first individual factor identified by Hodgetts and Luthans (2003) as being of value in assisting the expatriate develop accurate expectations is pre-departure training prior to the expatriate's departure to the foreign country. In order to avoid unnecessary confusion in the categorisation of pre-departure training, Hodgetts and Luthans assert that individuals can provide pre-departure training for themselves or can receive it from their companies. Therefore, pre-departure training needs to be categorised as either an individual or an organisational factor having an impact on the formation of accurate anticipatory expectations and mental adjustments.

Pre-departure training provides the prospective expatriate with specific information on the international assignment, as well as the culture within which the person will be required to live and work. It can therefore reduce the levels of concern about the assignment and the general environment in the foreign country. Cross-cultural training can also assist the future expatriate in forming accurate expectations of the new position and work environment (Cascio & Aguinis, 2005: 447; Morley et al, 1997: 58).



ii. Previous overseas experience

Previous international experience has been identified as a factor that is potentially of value in assisting the expatriates to develop accurate expectations prior to their departure to the foreign country (Black et al, 1999; Adler, 1997). However, conflicting results are observable in literature regarding the actual value of previous international experience in enhancing the future expatriate's adjustment.

Adler (1997) argues that expatriates who go through a cross-cultural experience in a foreign country move from a low to a high level of self-knowledge and cultural awareness. This cross-cultural adjustment implies that an expatriate who has successfully completed one international assignment should be able to adjust quicker and more effectively on any further assignments. Black and Gregersen (1999) agree with Adler in this regard, arguing that an expatriate who has been on an international assignment before can apply learning experiences gained from the previous assignment to reduce the confusion and turmoil associated with the new assignment.

In contrast to the above mentioned findings, Suutari and Brewster (1997) indicate that the assumption is often made that having lived in a foreign country has a positive impact on the formation of accurate expectations about another foreign experience. However, their research indicates that, although previous international experience can be positively related to successful expatriate adjustment, it would be overly simplistic to make the assumption that because a person has lived in one country he will automatically adjust to another country.

Research conducted by Van Weerdenburg (2006) concurs with the findings of Suutari and Brewster, indicating that previous overseas experience can have a positive impact on anticipatory adjustment. However, due to the fact that various aspects of living and working in one foreign country are not always directly applicable to another, the positive impact is moderate at best.



Van Weerdenburg (2006) found a positive correlation between previous expatriate experience and adjustment to the work environment. However, this positive relationship could not be extended to the general adjustment to the foreign environment. Mitrovica (2001) also indicates that the impact of previous international experience is the strongest when the last international assignment was relatively recent and when the degree of interaction with host-country nationals and involvement in the foreign culture was relatively high.

4.3.2. Expatriate selection and preparation

4.3.2.1. Background

The selection and training of suitable individuals for international assignments forms a very important part of the preparation phase prior to the expatriate's departure on international assignment (Brotchi & Engvig, 2006; Van Weerdenburg, 2006). One of the main reasons identified for the high expatriate failure rates experienced by multinational companies is their use of inadequate and/or inappropriate procedures and criteria during their selection of candidates for international assignments (Cascio & Aguinis, 2005).

Despite the convincing statistics available on the value of pre-assignment assessment and preparation, as well as the proven importance of all the other criteria correlated to overseas success, Cascio and Aguinis (2005: 443) conclude that multinational companies seem to prefer focusing their selection efforts on one single criterion, namely technical competence. Antal (2001) agrees with this argument, indicating that most companies that make use of international assignments, select individuals for such assignments primarily on the basis of the operational needs of a given position at a specific moment, and their inability to fill it with a host country employee. According to Antal (2001), international assignments are most often utilised as a "fire fighting approach" in dealing with operational crises in the foreign operations.



Beaverstock (2000) asserts that one of the most common approaches of identifying potential expatriates for overseas assignments is the so-called "coffee machine system". A typical scenario described by Beaverstock would be of a senior line manager standing next to the coffee machine when he is joined by a colleague:

'How's it going?' 'Oh, you know, overworked and underpaid.' 'Tell me about it. As well as all the usual stuff, Jimmy in Mumbai has just fallen ill and is being flown home. I've got no idea who we can get over there to pick up the pieces at short notice. It's driving me crazy.' 'Have you met that Simon on the fifth floor? He's in the same line of work. Very bright and looks like going a long way. He was telling me that he and his wife had a great holiday in Goa a couple of years ago. He seems to like India. Could be worth a chat.' 'Hey, thanks. I'll check him out.' 'No problem. They don't seem to improve the coffee though, do they?'

Suutari (2003) quotes a similar example: *"One day my boss came to me and asked whether I would be interested in going to Poland. I just agreed by saying: All right, why not, I have never been there, and I was incidentally present when the company started to make foreign acquisitions and as nobody else knew any more than I did about such things, I was selected"*.

Commenting on the above mentioned scenarios, Cascio and Aguinis (2005) state quite categorically: *"Technical competence has nothing to do with one's ability to achieve a task in a foreign cultural environment, adapt to a new environment, deal effectively with foreign co-workers, or perceive and, if necessary imitate the foreign behavioural norms. In fact, traits that may make a person a good performer in the domestic environment may be liabilities overseas"*.

In their criticism towards the "coffee machine system" of expatriate selection utilised by many multinational companies, Cascio and Aguinis (2005) assert that it is important to bear in mind that the fundamental purpose of the expatriate selection process is two-fold:



- to identify individuals who will remain for the duration of the international assignment;
- to achieve the strategic and the tactical objectives of their assignments.

In order to ensure the most effective and accurate identification and appointment of individuals for international assignments, Black et al (1999) argue that a more strategic approach needs to be taken in establishing an expatriate selection process. They propose a two-stage process for how multinational companies should strategically approach the selection process for international assignments.

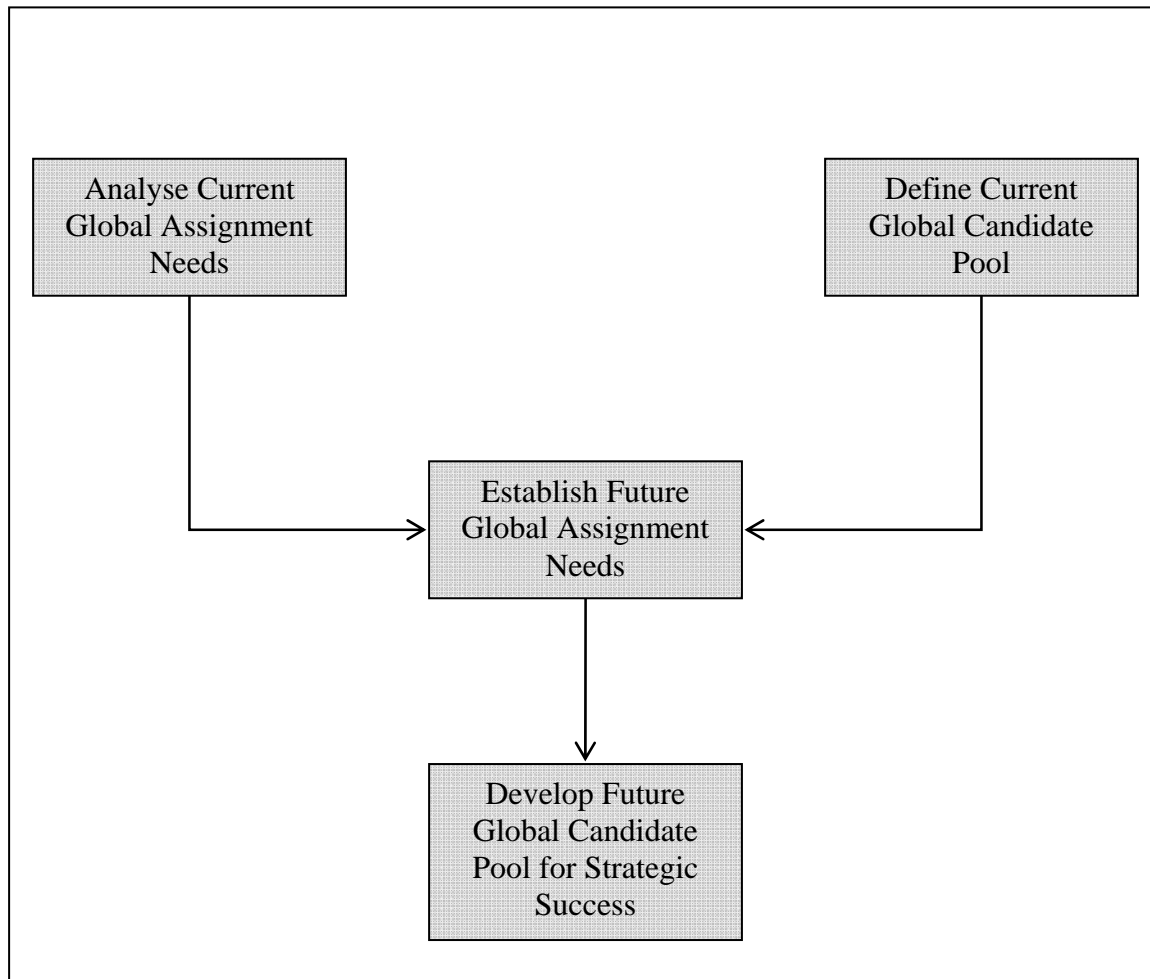
4.3.2.2. Comprehensive approach to ensure selection of suitable expatriates

Black et al (1999) recommend the following two stages in the expatriate selection process. The first stage is to carry out a strategic analysis of the company's international assignment needs. On completion of the strategic analysis, the second stage is the implementation of a selection process to ensure the most suitable individuals are appointed in specific global positions. Herewith, a more detailed discussion on these two stages.

i. Stage 1: Strategic analysis of international assignments

In order to make international assignments truly strategic, Black et al (1999) state that a careful analysis needs to be conducted of the company's current international assignment needs. It is also critical to define the company's current global candidate pool, and to assess whether the pool of candidates will be large enough to meet future demands for effective global managers. A graphical display of the first phase of their recommended process is provided in Figure 4.2.

Figure 4.3.: Strategic analysis of international assignments



(Black et al, 1999: 77)

a. Analyse current international assignment needs

Several factors need to be considered during the analysis of the company's current international assignment needs. An analysis of these factors can help the company determine its international assignment needs from a strategic perspective (Black et al, 1999).



A critical factor to be taken into account in the establishment of the company's international assignment needs would be the organisation's current stage of globalisation. An expatriate position in an export company may have significantly fewer demands compared to a company in the multinational stage (Adler, 2003; Black et al, 1999).

A further consideration to be taken into account during the assessment of the current international assignment needs is the strategic functions the assignment should play. The company may for example need to decide whether it wants to make use of international assignments to ensure better coordination and control of foreign subsidiaries, or to develop future executives by giving them international assignments as development experiences (Suutari, 2003; Black et al, 1999). Auon et al (2006) emphasise that companies should strongly consider the business rationale underlying each international assignment. A further question that needs to be answered is whether it would not make more business sense to appoint a local national employee in the position.

b. Define the candidate pool

Multinational companies need to know the composition of their current candidate pool of global managers. In order to keep up-to-date with the available pool of candidates, Black et al (1999) recommend that companies make use of comprehensive databases to obtain information on for example a manager's current assignment, technical qualifications, previous global experience, cross-cultural skills, and management potential within the company. The establishment and maintenance of such a database may require an initial investment of time and resources. However, a well-maintained database can be very useful in searching for the candidates with the best technical and cross-cultural skills to appoint in a specific global position.



c. Determine future requirements

In order to establish a strategic and appropriate expatriate selection approach, multinational companies also need to take into account their future international assignment requirements (Frandsberg & Kjellman, 2005; Black et al, 1999). These future needs will also be a function of the company's future globalisation stage and of the necessary strategic functions for maintaining a global competitive advantage.

In order to assess future needs accurately, the company also needs to consider the future key strategic functions required. If the company intends to make several key strategic acquisitions in various countries to develop additional technological synergies, it will be necessary to move technology and information from operation to operation and from overseas to headquarters. The effective flow of information may require an increased number of international assignments (Black et al, 1999).

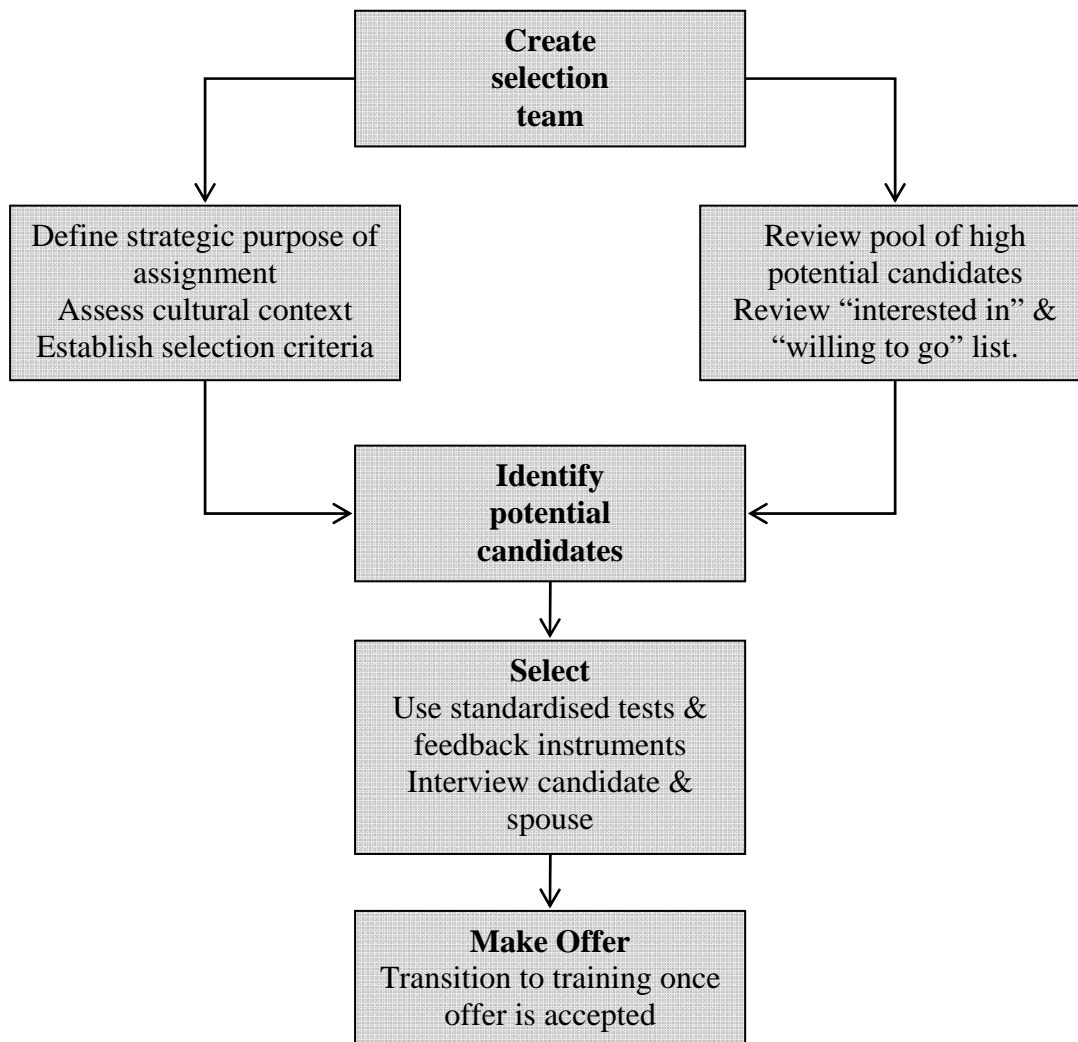
d. Establish expatriate candidate pool for strategic success

According to Black et al (1999), the final strategic step in preparing for the company's future international assignment needs is the development of its international assignment candidate pool. In order to develop a sufficient pool of qualified candidates for international assignments, the company should ensure regular assessments of employees' managerial and cross-cultural skills. As part of the normal management potential advancement (which typically includes traditional assessment centre processes and management development programmes), the company also needs to include the assessment and development of the critical skills and personal characteristics required for successful international assignments.

ii. Stage 2: Selection and preparation process for specific assignments

After completing the strategic analysis of the international assignments within the company, the next stage in the establishment of an expatriate selection process is to ensure the most appropriate and suitable individuals are appointed in expatriate positions. Black et al (1999) propose the following key activities that should lead to more successful and accurate expatriate selection decisions.

Figure 4.4.: Strategic international assignment selection process



(Black et al, 1999: 80)



a. Appoint a selection panel

The first step in the selection process is to appoint a selection panel. This panel should consist of at least three members: a parent-country manager, a host-country manager, and a Human Resource Department representative (Treven, 2001; Black et al, 1999). The inclusion of the parent- and host-country managers helps to ensure the requirements of both the company headquarters and the subsidiaries are met.

The host-country manager might also be elected to act in the capacity of mentor for the expatriate during the assignment. The role of the Human Resources representative should be to coordinate the selection process, ensure that the appropriate selection criteria are utilised, and to assist in identifying an appropriate number of candidates to select from for the position.

b. Define strategic purpose of international assignment

The next step in the process should be for the selection team to determine the strategic purpose of the international assignment (Jagatsingh, 2000). Swaak (1995) distinguishes the following seven categories of expatriates by purpose of assignment:

- Assignments to develop specific skills and talents;
- Short- and long-term assignments where specialists are utilised to carry out specific duties , and then to transfer such skills and knowledge to the local nationals;
- Project assignments, where specialists are sent on short-term assignments in order to develop and implement specific plans and projects, and then to return to the parent company or be sent on other expatriate assignments;
- Long term or permanent assignments, where interested individuals are sent on assignments for periods of two years and longer. These expatriates may then elect to remain in the host country as local employees on completion of their assignments;



- Management assignments, where senior executives oversee and control an overseas subsidiary in order to provide stability in an operation;
- Regional coordination assignments, where specialists who excel in managing local operations oversee and integrate various countries in a region;
- Worldwide management assignments, where global career executives oversee and integrate the activities of different regions.

Taking into account the various reasons why international companies can make use of expatriates, both Jagatsingh (2000) and Black et al (1999) deem it critically important to determine the purpose of each international assignment before any candidates are identified for the particular position.

c. Assess cultural context

It is important to determine the cultural context within which the international assignment will be functioning (Treven, 2001; Black et al, 1999). Trompenaars and Hampton-Turner (2004) found that the bigger the difference between the expatriate's current culture and the culture in the host-country where the international assignment will be positioned, the bigger the cultural adjustment and subsequent cross-cultural communication and language skills required. These factors may have a significant impact on the selection criteria utilised and the final decision on the most suitable candidate.

Shin et al (2003) suggest that relationship dimensions such as cultural empathy and interpersonal skills become important when dealing with cultural differences. Their meta-analytic review indicated that better interpersonal skills were associated with greater adjustment to the general environment, particularly in cultures that place great importance on the social and interpersonal elements of the workplace.



d. Establish selection criteria

One of the most difficult and confusing issues in selecting an employee for an international assignment is determining the qualities that the candidate should possess in order to be successful (Gelfand et al, 2006; Nyfield et al, 1995).

On the one hand, Cascio and Aguinis (2005) assert that most international companies focus their efforts during their selection of candidates for expatriation solely on two criteria, namely technical competence and job knowledge. This finding is confirmed by literature indicating that technical competence is viewed as a crucial criterion for expatriate success by multinational companies, by host country-nationals, as well as by expatriates themselves (Suutari, 2003).

On the other hand, Harvey and Novicevic (2001) indicate that researchers have developed relatively long and confusing lists of critical factors to consider when selecting candidates for international assignments. An example in this regard would be the expatriate selection model proposed by Harris and Moran (as cited in Jordan & Cartwright, 1998), which includes 68 dimensions of overseas success, of which 21 dimensions are viewed “the most desirable”.

A definite concern in this regard would be that very few sufficiently comprehensive approaches could be identified during this literature study that incorporate all the various models. No agreement also seems to exist among researchers on the most important criteria to be utilised during the selection of candidates for expatriation. In his commentary to the confusion existing on the selection criteria to be used, Van Weerdenburg (2006) asserts: “...*taking into account the amount of criteria available, it is not surprising that companies only focus on technical competence during their selection processes*”.

An example of the sometimes unrealistic selection criteria proposed by researchers would be the Jordan and Cartwright's (1998) reference to Heller (1980) who is of the opinion that the successful expatriate should have "*a flexible personality, with broad intellectual horizons, attitudinal values of cultural empathy, general friendliness, patience and prudence, impeccable educational and professional (or technical) credentials – all topped up with immaculate health, creative resourcefulness, and respect for peers. If the family is equally well endowed, all the better*".

In order to create a level of organisation and structure to this confusing situation, Beaverstock (2000) established a short list of selection criteria utilised most often by companies in the United States of America, Europe and Scandinavia. These selection criteria are shown in Table 4.1 below.

Table 4.1.: Expatriate selection criteria in America, Europe and Scandinavia

United States	Europe	Scandinavia
1. Performance in similar job	1. Technical expertise	1. Technical/professional qualities
2. Knowledge of position	2. Language	2. Previous achievements
3. Competitiveness	3. Family support	3. Motivation
4. Leadership skills	4. Managerial potential	4. Managerial talents
5. Administrative skills	5. Knowing company systems	5. Independence
6. Willingness to accept assignment	6. Experience	6. Communication talents
7. Knowledge of the company	7. Marital status	7. Language skills
8. Reputation	8. Medical status	8. Ambition and commitment
9. Willingness to accept more responsibility	9. Independence	9. Flexibility
10. Past expatriate performance	10. Motivation	10. Adaptability of the family
11. Potential for senior position		
12. Spouse's attitude to assignment		
13. Ability to work with foreign employees		

(Factors ranked in order of importance 1=highest)

(Beaverstock: 2000)



An interesting trend observable from the table above would be that companies in all three regions utilise technical expertise and ability to do the job as the most important criterion during their selection of expatriates. In his analysis of the criteria utilised by companies in the various regions, Beaverstock (2000) also identifies no significant differences in the criteria used by the multinational companies in the three regions. Other common competencies applied by companies in all three regions are experience, leadership and management skills, motivation, ambition, and family situation.

Shin et al (2003) view expatriate acculturation as a multi-dimensional process rather than a one-dimensional phenomenon. Therefore, the selection procedures utilised by multinational companies should be changed from a one-dimensional focus on technical competence as the decisive factor to a more multidimensional focus. They propose a four-dimensional model that associates specific general behaviours to success while on international assignment. They recommend that the expatriate selection process focus on evaluating the candidate's strengths and weaknesses in the following four dimensions: the self-oriented dimension, the others-oriented dimension, the perceptual dimension, and the cultural-toughness dimension.

As indicated in these examples, the number of important dimensions identified by researchers for the selection of candidates for expatriation is basically unlimited and is to a large extent dependent on the person who conducted the research.

e. Identify candidates from expatriate candidate pool

As mentioned earlier, one of the commonly used methods used by companies in identifying potential expatriates for overseas assignments is the so-called "coffee machine system", where expatriates get selected on an ad hoc basis without any formal process involved (Beaverstock, 2000). A consequence of this practice is that only those managers that a particular person happens to know are considered for international assignments. The consequences of making use of such a haphazard and "fire fighting approach" in selecting expatriates can be severe and very often lead to expatriate failure.



To avoid the use of the “coffee machine system” in selecting individuals for international assignments, Black et al (1999) recommend the establishment of a pool of high-potential candidates, as well as the continued updating of a database containing details of the identified candidates. This database can then be utilised to identify the highest number of potential candidates to select from for a particular assignment. Beaverstock (2000) also recommends that the employees in the pool need to be reviewed on a regular basis to identify who is interested in and willing to go on an international assignment. This will allow the company to avoid reviewing candidates or making offers to candidates who are not available or not interested.

f. Utilise standardised assessment instruments and feedback instruments

After an appropriate number of candidates have been identified for a particular international assignment, the next step in the selection process is to conduct properly standardised assessment methods on the candidates in order to determine their suitability for the assignment (Cascio & Aguinis, 2005; Black et al, 1999). Taking into account the costs and risks involved with an international assignment, Melles (2005) is of the opinion that the expense of utilising valid and standardised assessment and feedback instruments during the selection process should be viewed as an investment in the future, rather than just an unnecessary short-term expense.

However, a criticism expressed by multinational organisations against the use of selection instruments in their identification of expatriates is the validity and reliability of the available assessment instruments that are utilised to evaluate the specific criteria (Van Weerdenburg, 2006). Grove and Hallowell (2006) even go so far as to assert that there is no reliable way to determine in advance whether an individual will be successful as an expatriate. According to them, there are too many factors having an impact on the individual’s success, many having nothing to do with the individual. For this reason, Grove and Hallowell indicate that the assessment of prospective expatriate suitability can have only one realistic aim: to identify those candidates who are the most likely to fail on international assignment in a foreign country due to obvious concerns or low readiness.



As a result of the controversy surrounding the validity and reliability of selection instruments, Cascio and Aguinis (2005) indicate that international businesses tend not to use any significant selection tools during their identification of suitable candidates for international assignments. In this regard, a study conducted by Tung (as cited in Dowling et al, 1999) indicates that only 3 percent of companies included in the study reported formally assessing technical competence. A possible reason mentioned by Tung for this low rate would be the fact that most candidates for international assignments tend to be internal recruits.

According to Suutari and Brewster (1997), the assessment tools most often used by international businesses for expatriate selection are the gathering of biographical data, standardised tests, work samples, and assessment centres. They indicate that selection interviews and personal references are also widely applied, but are less effective.

g. Interview candidate and spouse

Both Grove and Hallowell (2006) and Treven (2001) assert that interviews also need to be held with the expatriate spouse. The purpose of these sessions is to provide the spouse with a realistic perspective on the living conditions in the foreign country, and to identify specific family needs. The interviews held with the expatriate and the spouse should be conducted in a context where both the company representative and the future expatriate and spouse can share perspectives on all aspects of the position and the foreign country.

A further reason for interviewing the expatriate spouse is to investigate the level of motivation he has for the assignment. Punnett (2002) states that the extent to which the spouse is able and willing to adjust to the international assignment is positively related to the expatriate's adjustment, as well as the expatriate's intentions to complete the international assignment. Punnett also found that the better the emotional preparation of expatriates and their spouses before their departure on the assignment, the better the chances are of them successfully adjusting to the conditions in the foreign environment.



h. Make offer to candidate

Stahl et al (2002) are of the strong opinion that the decision to appoint a person in an international assignment position is a two-way process. On the one hand, the company selects the individual or couple as the most suitable to be sent on the international assignment. On the other hand, the expatriate and the spouse elect to accept the benefits and responsibilities associated with the international assignment in a particular foreign country. Within the framework of this psychological contract, it is critically important that all the processes be conducted in a correct and appropriate way.

i. Make transition from selection to training and preparation

After the prospective expatriate has accepted the offer to go on an international assignment, the final step in the process is to prepare the person for the work and living conditions in the foreign country. Black et al (1999) assert that sufficient time should be provided prior to the person's departure on the international assignment for the appropriate training and preparation to be initiated.

Of significant importance during this stage would be the training of the expatriate on cross-cultural empathy and awareness (Gelfand et al, 2006; Cascio & Aguinis, 2005; Luthans & Farner, 2002). The purpose of cross-cultural training is to prepare the prospective expatriate to understand and effectively interact with persons from different cultures. According to Eckert (2006), the following principles form the basis for cross-cultural training:

- Self-understanding: knowing that every human behaviour is influenced by basic cultural assumptions, values and beliefs; an acknowledgement that all people are culturally bound;



- Understanding others: knowing that inter-cultural miscommunication happens as a result of people's different styles; understanding that different does not necessarily mean inferior;
- Different styles of interaction: learning to check and accept assumptions about behaviour that are different from what the expatriate might expect in a situation; learning different listening and responding styles; preparing a range of options and choices to deal with different situations.

One of the reasons mentioned by Luthans and Farner (2002) for providing cultural training is to assist in containing the failure rate of expatriates. The vast majority of these failures can be linked to the inability of the expatriate and/or spouse's to adjust to the culture in the foreign country. Meta-analyses conducted by Deshpande and Viswesvaran (as cited in Cascio & Anguinis, 2005: 449) indicate that cross-cultural training positively impacted on the following areas: self-development, relationships with local nationals, adjustment to culture shock, and job performance. Similarly, Lievens (as cited in Cascio & Anguinis, 2005: 449) also found a correlation of 0.38 between cross-cultural training and supervisory ratings, and 0.45 with language proficiency.

4.4. Summary

In Chapter 4 the focus was placed on the anticipatory adjustment processes utilised by the expatriates in their preparation for the international assignment. Attention was also given to the importance of making use of a strategic selection approach in identifying the most suitable candidates, and the impact this strategic approach could have in the enhancement of the company's global competitiveness and the success of the individual. The above mentioned discussions are in line with Postulate 3 established in this study, which states that the organisational climate prior to (and during) the international assignment has a significant influence on the levels of emotional health of the expatriate.

In Chapter 5, the dynamics involved with the expatriate's adjustment to the unfamiliar conditions in the foreign country are discussed.



Chapter 5

On international assignment

5.1. Introduction

The overall postulate set in this study is that a relationship exists between the expatriates' levels of emotional health, personality, and their perception of the organisational climate while on international assignment in a foreign country, and that this relationship can be incorporated into a model. In order to prove this postulate, an investigation needs to be conducted on the dynamics having an impact on the expatriate while on assignment.

The expatriate's integration into the foreign environment is the most important phase in the international career cycle (Beaverstock, 2000; Adler, 1997). In Chapter 5, the dynamics involved with the expatriate adjusting to the foreign environment are discussed – from a personal, work, and a social or cultural perspective.

5.2. Expatriate adjustment

Marx (1999: 4) asserts that all individuals who arrive on an international assignment in a foreign country for the first time are confronted with the same basic challenge: adjusting to the new culture in the foreign country, and becoming effective in managing the unique demands placed on them as expatriates. The term 'adjustment' is defined as "*a subjective or psychological state, and refers to the changes which the individual actively brings about or passively accepts in order to achieve or maintain satisfactory states of emotional balance within him or herself*" (Yavas, 2001).

Numerous definitions have been proposed for expatriate adjustment. Yavas (2001) defines expatriate adjustment as "*the degree of psychological adjustment experienced by the individual, or the degree of comfort, familiarity, and ease that the individual feels towards the new environment*". According to Yavas, expatriate adjustment is a type of cross-cultural adjustment.



Morley et al (1997: 55) describe expatriate adjustment as a process whereby expatriates re-establish those routines that provide valued outcomes and predictable feelings of control. Punnett (2002) points out that the adjustment process is not only applicable to the expatriate, but will also have a direct influence on family members who have also been transferred into the foreign environment.

A distinction needs to be made between the expatriates' personal adjustment and their socio-cultural adjustment to the foreign environment (Gelfand et al, 2006; Van Oudenhoven, 2002). Personal adjustment provides an indication of internal psychological outcomes, for example personal satisfaction and emotional health. Socio-cultural adjustment refers to external psychological effects that link the expatriates to their new social environment, for example the ability to cope with day-to-day obstacles. According to Van Oudenhoven (2002), socio-cultural adjustment can be translated further into two distinct areas, namely professional adjustment (referring to the amount of satisfaction with the new work environment in the host country), and social adjustment (referring to satisfying social relationships in the host country).

Trompenaars and Hampton-Turner (2004: 331) also refer to this process of expatriate adjustment as "culture shock". The term 'culture shock' was originally established by the anthropologist Oberg (as cited in Marx, 1999: 5), who explained both the symptoms and the process an individual goes through in adjusting to a new culture. According to Oberg, having to adjust to the new culture is viewed as a shock or as an unpleasant disruption. This shock takes place when the person's expectations are not in line with the practical reality.

Adler (1997) defines culture shock as "*the expatriate's reaction to a new, unpredictable, and therefore uncertain environment*". According to Adler, expatriate culture shock is the result of a breakdown in the global manager's "*selective perception and effective interpretation systems*". In the foreign environment, the global manager asks the questions: "To what should I pay attention?" and "What does it mean?"



An overload of stimuli in the form of objects, sounds, smells, tastes, and feelings bombard the senses of the global manager. The person finds it difficult to distinguish between those stimuli that are meaningful, and those that are unimportant and therefore need to be ignored. When arriving in a new culture, the expatriate has no framework within which he can interpret the local culture. The person then acts inappropriately and ineffectively, because the home culture's interpretive system does not fit the foreign culture.

Similarly, Eckert (2006) describes culture shock as the disorientation and frustration newly arriving expatriates experience when they encounter different cultures and norms. *“Because our own culture is often invisible, taken for granted, emotionally charged, and taught to represent moral high ground, we have a tendency to assume that something is wrong with others, not with us, and to define our own culture as ‘more natural, more rational, or more civilised’. In doing so, we undervalue the other culture by defining it as ‘immoral, irrational, or uncivilised.’”*

Mitrovica (2001) states categorically that experiencing culture shock is not a weakness or a negative indication of future international success. According to Mitrovica, culture shock forms part of the normal adjustment process that successful expatriates go through in adjusting to the culture in a foreign country. Gelfand et al (2006) agree with Mitrovica in this regard, indicating that severe culture shock is often indicative of an expatriate becoming deeply involved and learning the new culture, as opposed to isolating him or herself in an “expatriate ghetto”. The expatriate experiencing the culture shock should therefore view the adjustment process as a sign that they are doing something right, and not wrong. For them, the important question therefore becomes how best to manage the stress caused by culture shock, not how to avoid the culture shock itself. These assertions are in line with Postulate 1 set in this study, which stipulated that the emotional health of the individual expatriate is significantly and negatively influenced during the three phases of the international career cycle.



A study conducted by Hawes and Kealey (as cited in Marx 1999) on Canadian expatriates in Africa confirms the above mentioned assertion. In their study, Hawes and Kealey found that those expatriates who experienced culture shock were ultimately the most effective. Expatriates who were most aware of themselves and their emotions experienced the most intense culture shock, but it was exactly because of this intense awareness of differences that they were also able to adapt more effectively later on. In contrast, expatriates who were not affected by culture shock and generalised their own views to the other culture, did not adapt very well. According to Marx (1999), culture shock is therefore a positive indication in the process of international adjustment.

Black and Gregersen (2003) go so far as to assert that it is impossible for the expatriate to inoculate him or herself to avoid culture shock. Even if it was possible to avoid the culture shock experience, it would not be advisable. According to them, the expatriate learns the most valuable lessons by directly experiencing the anxiety and frustration of trying to understand the country and its culture, and by adjusting the existing ways of doing things to the local customs in the host country. However, Black and Gregersen also caution that severe culture shock can also lead to significant problems from a business perspective (in the form of lost business opportunities, dissatisfied clients, mistakes during negotiations, impaired relationships with business associates), as well as from a personal point of view (for example depression, divorce, substance abuse, and child abuse).

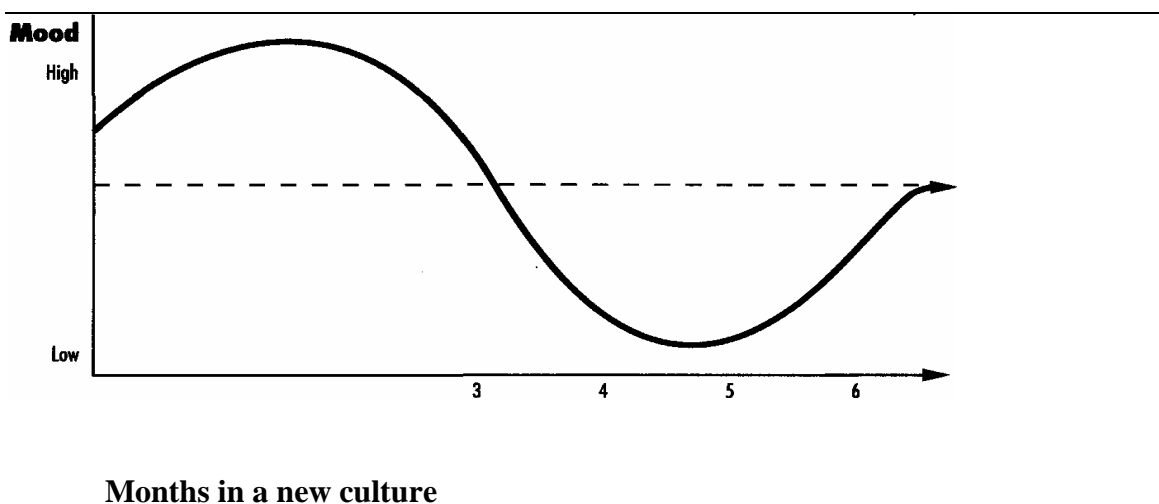
5.3. Culture shock cycle

According to the culture shock adjustment model developed by Oberg (as cited in Marx, 1999: 7), an expatriate's adjustment to a new environment progresses through a cycle of clearly defined phases on the way to final adjustment. Oberg highlights six symptoms typically experienced by expatriates when they are subjected to culture shock:

- Stress caused by the effort to adjust to the new environment;
- Emotions of deprivation due to loss of family, friends, status, career, and personal belongings;
- Experiencing rejection from local nationals in the host country, or isolating self from them;
- Disorientation in function, values and self-identity;
- Apprehension and antagonism towards local practices in foreign culture;
- Emotions of helplessness due to an inability to adjust to the foreign conditions.

Torbiorn (as cited in Beaverstock, 2000) made certain adjustments to Oberg's culture shock model in order to incorporate the various phases of the expatriate adjustment process. According to Torbiorn, newly arriving expatriates typically experience an initial 'honeymoon' phase, followed by 'culture shock', and then progress through a difficult but necessary adjustment phase towards recovery and integration into the foreign culture. The expatriate's cross-cultural adjustment to the environment in a foreign country can be described as a U-shaped curve and is referred to as the cultural shock cycle (Hodgetts & Luthans, 2003; Chan, 1999).

Figure 5.1.: Culture shock cycle

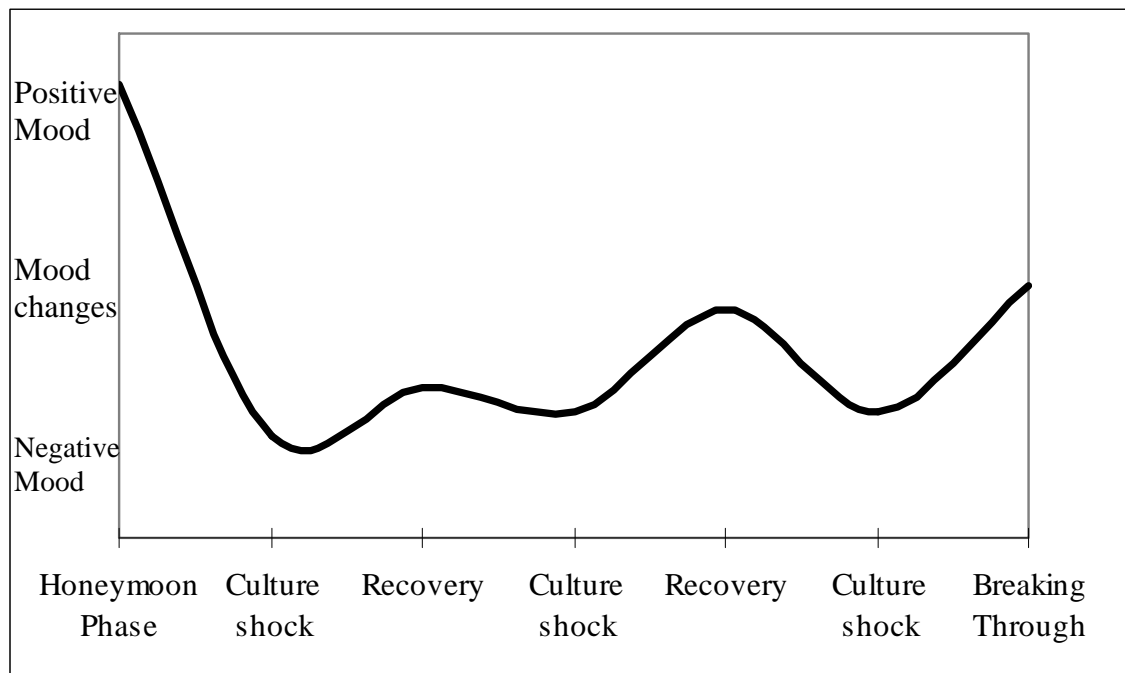


(Hodgetts & Luthans, 2003)

A number of attempts have been made to specify the timing of the various phases involved in the culture shock cycle, and to define what is ‘normal’ in adapting to a foreign culture. Trompenaars and Hampton-Turner (2004) argue that no hard-and-fast rule exists in this regard, and that it is not possible to give an exact indication of the “typical time” it takes the expatriate to adjust to the foreign culture. The timing of culture shock will depend on the ‘foreignness’ of the culture (how different it is to the person’s own culture), the social context (whether the person has support through an expatriate network or through host-country nationals), and the personality of the international manager involved.

The phases of culture shock may not always progress through such a logical and planned sequence. According to Marx (1999: 10), culture shock should not be regarded as a strictly linear process. It should rather be viewed as a repetitive and dynamic series of positive and negative phases until the expatriate breaks through the culture shock, as can be seen in Figure 5.2.

Figure 5.2.: Alternative culture shock cycle



(Marx, 1999)



A study conducted by the United Kingdom Centre for International Briefing (as cited in Marx: 1999) found that expatriates included in the study experienced symptoms of culture shock for approximately seven weeks: 70 percent of expatriates indicated that the symptoms lasted up to five weeks, and 30 percent experienced some levels of culture shock for up to ten weeks into their assignments. Research conducted by Tung (as cited in Beaverstock, 2000) on 409 expatriates in 51 countries indicated that approximately 30 percent of them took between six and twelve months to adjust to the environment in the foreign country. A discussion on the phases included in the culture shock cycle follows:

5.3.1. Phase 1: Honeymoon

During the initial honeymoon phase, the expatriates enjoy a great deal of excitement as they discover the new culture (Marx, 1999). Everything they come into contact with is viewed as new and stimulating. The new environment is seen as presenting unlimited opportunities. The expatriates often experience intense emotions of happiness and curiosity, and shows great eagerness to face whatever challenges coming their way.

The newly arrived expatriate tends to reserve his judgment of the new culture at this stage, and may even tend to suppress minor irritations in favour of focusing on the pleasant things surrounding the new position, colleagues, the company, social environment, and the country in general. During the person's initial arrival in the host country, local nationals and fellow expatriates may also feel obliged to welcome the person, or may be naturally curious to meet the new arrivals. This initial honeymoon phase could last between two weeks to the first few months, and is typically followed by the culture shock or disillusionment phase (Black & Gregersen, 2003; Punnett, 2002).



5.3.2. Phase 2: Culture shock

The second phase, culture shock, is generally characterised by the expatriate experiencing a general discomfort and foreignness towards the new situation. This discomfort often starts with the person feeling confused about developments in the foreign environment. In severe cases the expatriate can potentially go so far as to start hating everything that is foreign. The person may also suffer abnormal symptoms such as becoming highly stressed and irritable, experiencing difficulty doing 'normal' things such as eat or sleep, and developing an overly negative perspective towards the position, colleagues, and the country (Trompenaars & Hampton-Turner, 2004; Punnett, 2002).

The main reason for the above mentioned symptoms of culture shock is the uncertainty experienced by the expatriate about him or herself, the foreign surroundings and the future. The usual signs of orientation and belonging that used to be in place in the home country do not apply anymore, and the person does not quite know who he is without the familiar social context. During culture shock, expatriates often find it difficult to make sense of other people's behaviour. Their own behaviour also seems out of place and does not produce the expected results. They find an inability to develop new, culturally appropriate responses towards a foreign environment making demands that they do not understand (Trompenaars & Hampton-Turner, 2004; Punnett, 2002; Marx, 1999).

The initial phase of confusion is often followed by a period of intense emotional turmoil and disillusionment. This period of disillusionment forms the bottom of the U-shaped curve and is characterised by culture shock - the frustration and confusion associated with being faced with too many unknown and confusing stimuli (Brotchi & Engvig, 2006; Punnett, 2002).



Marx (1999: 5) identifies the following symptoms as the ones most often experienced by the expatriate during culture shock: feeling isolated, anxiety and worry, confusion about what to do, reduction in work performance, an inability to get close to business partners, inappropriate social behaviour, an inability to concentrate, feelings of depression and helplessness. Trompenaars and Hampton-Turner (2004) add to the above mentioned list, indicating that the symptoms of culture shock are similar to those of mild neurosis: skin rashes, appetite-loss, depression, sleeplessness, swellings, palpitations, and so forth.

Marx (1999) asserts that the way in which expatriates deal with the emotions and symptoms associated with the culture shock phase is essential for their general adjustment in the long term. She indicates that the most inappropriate approach in dealing with the symptoms of culture shock would be to disregard the symptoms, to make use of quick-fix solutions (including the long-term use of tranquilisers), or to become rigid in believing that only one's own methods are correct, and forcing these methods on the local nationals in the foreign country.

A further mistake typically made by expatriates is to blame others for the problems and frustrations they experience in adjusting to the foreign environment. Parties who get blamed for such frustrations would typically be host-country nationals, the company, and the expatriate spouse. Adler (1997) also cautions against expatriates falling for the temptation to blame others of causing their problems. Adler identifies blame as a generally unproductive stress management technique that does not lead to effective dealing with the problems faced by the expatriate.

According to Marx (1999), the ideal approach in dealing with the culture shock is for expatriates to use the symptoms and confusion as facilitators that drive the transformation from the 'old' approach towards an active engagement in personal development - both in managing their own emotions, and in developing a better understanding of themselves and others. Trompenaars and Hampton-Turner (2004) agree with Marx in this regard, indicating that the culture shock experienced will persist unless the individual makes a conscious decision to confront and break through it.



5.3.3. Phase 3: Adjustment

The adjustment stage is the period where expatriates gradually become more familiar and receptive towards the foreign culture. They become increasingly competent at functioning effectively in the new environment. After approximately three to six months, the expatriates outgrow their culture shock "low" and begin living a more normal life in the foreign country. They start feeling more positive, working more effectively, and living a more satisfying lifestyle. In small steps, they learn what is important and what is meaningful in the foreign culture. They learn when "yes" means "yes," when it means "maybe," and when it means "no." They learn which behavioural signals to focus on and which ones to ignore. They also learn to differentiate individual behaviour from behaviour that reflects a cultural pattern (Punnett, 2002; Adler, 1997).

A key aspect identified by Punnett (2002) to escaping the culture shock "low", is effective problem solving. Successful expatriates recognise that the foreign environment makes many demands for which they must find or create solutions. They recognise that they may not fully understand the situation and must find ways to get reliable information and expertise.

Critical skills required by expatriates during their initial adjustment to the foreign country would be the ability (a) to be patient, and (b) to be creative in finding unique solutions to unfamiliar problems. Effective global managers "know that they do not know." They realise that they are faced with unfamiliar challenges, and that they will not act as effectively in the new environment in the foreign country compared to their home country, especially during the initial phases of the expatriation process. They recognise the importance of developing appropriate stress management techniques, such as making use of so-called "stability zones" that will not have a negative impact on their relations with colleagues, clients, or family.

Effective global managers also recognise that all members of the family experience culture shock during their adjustment to a foreign country, and that the relocation often has a more significant impact on the spouse than on themselves. Successful expatriates therefore view cross-cultural adjustment from a strategic systems perspective, and not as an individual problem (Eckert, 2006; Marx, 1999; Adler, 1997).

Research conducted by Tung (as cited in Beaverstock, 2000) indicates that expatriates and their families develop specific ‘coping mechanisms’ to minimise the occurrence of adjustment problems due to culture shock. The survey conducted by Tung identified eight fundamental coping mechanisms actively utilised by these expatriates to alleviate the impact of culture shock during their adjustment in the foreign environment.

Table 5.1.: Expatriate coping mechanisms

Coping Mechanisms	Mean
1. Learning more about host country, including language	4.16
2. Socialising with host nationals	3.67
3. Spending more time with family	3.47
4. Remaining in contact with family and friends in the home country	3.37
5. Socialising with other expatriates	3.35
6. Keeping occupied with sports and athletics	3.16
7. Keeping busy with work all the time	3.14
8. Making use of stress relieving activities, such as consuming alcohol	1.90

Mean scores are based on 5-point scale, 5=strongly agree

(Beaverstock, 2000)

As can be seen in Table 5.1, the most constructive and widely used approaches applied by expatriates were to learn as much as possible about the host-country, and to socialise with local nationals. Of interest in this regard would be the eighth coping mechanism highlighted by Tung, namely the consumption of alcohol. This finding is in line with a commonly observed tendency by the researcher among expatriates to spend much of their free time in local restaurants or pubs with their colleagues. This tendency is particularly prevalent among single people or expatriates who go on assignment and who leave their families behind in the home country.

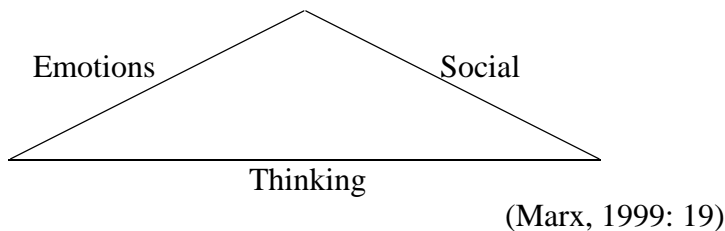
5.4. Dimensions of culture shock

Expatriates have to cope with three dimensions of culture shock (Marx, 1999):

- Thinking - person has to change his perspective and interpretation of events and behaviour in order to understand and adjust to the local culture in the foreign country;
- Social identity - person needs effective social or interactive skills to develop a social and professional network and establish new business relationships;
- Emotions - person has to cope with the stress and emotional turmoil associated with the transition in order to be successful in his management of the foreign operations.

Shin et al (2003) also refer to the above mentioned dimensions as the perceptual dimension, the relationship dimension, and the self-dimension. These three levels of culture shock can be incorporated into a triangular culture shock model (Marx, 1999).

Figure 5.3.: Expatriate adjustment triangle



Although the three components incorporated into the triangular culture shock model are dealt with as separate elements, they are interconnected and influence each other. According to Marx (1999), the only managers who can be called truly international are those who sufficiently understand themselves, and who develop as thinking, emotional, and social beings. Marx asserts that expatriates need to have a significant amount of self-understanding in these areas before they can have a clear understanding of their foreign counterparts. Taking into account the importance of thinking skills, emotions, and social skills on the expatriate's adjustment, it would therefore be appropriate to conduct a more detailed discussion on these areas.



5.4.1. Thinking

Marx (1999) states that for a person living in a well-known, organised, and predictable environment to understand life and developments in his life is relatively uncomplicated. The person has grown up understanding and having exposure to the meaning of words, non-verbal behaviours, and cultural norms commonly used in his living and work environment.

When the person moves to a foreign country, he is required to make a drastic paradigm change (Trompenaars & Hampton-Turner, 2004; Nelson-Jones, 2002; Marx, 1999). The person needs to learn new things and expand his thinking. The “normal way of doing things” does not exist anymore. The person is suddenly required to make a concerted effort to understand what is going on in the new environment.

According to Marx (1999: 14), newly arrived expatriates can deal with foreign and unfamiliar situations in one of four ways:

- Consciously disregard the unfamiliar situations;
- Choose to deal with them as familiar situations, as if they are still in the home country;
- Attempt to abandon their own culture and identify themselves with the new ways of thinking;
- Admit that they cannot make sense of the unfamiliar situations, make the appropriate adjustments, and then modify their perceptions and stereotypes.

In line with the above mentioned approaches in dealing with the unknown environment in the foreign country, expatriates need to make a decision on how to deal with the unknown culture. They can assume one of the following roles in their reaction to the local culture (Trompenaars & Hampton-Turner, 2004: 328; Marx 1999: 15):



- A native - overreacting and fully integrating into the culture in the foreign country;
- A colonialist - not even reacting to the foreign country;
- An imperialist – rigidly imposing their own value system and cultural paradigms on the local culture, without identifying the importance of adjusting their perceptions and attitude;
- An internationalist (also referred to as an interculturalist) - a person who is sensitive towards the complexity and ambiguity of social interactions in foreign cultures, and who makes an effort to adjust by modifying their own cultural paradigms and by trying to obtain a compromise between cultures.

Similarly, Morley et al (1997: 56) refer to the approach taken by the newly arrived expatriate in relating to the host culture as the person's "acculturation strategy". They identify four basic acculturation strategies that expatriates can use, dependent on their perspective towards two issues, namely the extent to which they prefer to preserve their own cultural identity, and the degree to which they seek day-to-day interaction with host country nationals:

- Assimilation takes place when expatriates make the decision not to maintain their own culture, and attempts to integrate themselves into the dominant society in the host country;
- Integration takes place when expatriates show an interest to adjust by maintaining a balance between their own cultural identity, and interacting with host country nationals on a day-to-day basis;
- Separation is referred to when expatriate places a high value on maintaining their own culture, and does not make any effort to interact with host country nationals;
- Marginalisation occurs when expatriates withdraw themselves and show little interest in developing relationships with either other members of their own culture, or with host country nationals (Morley et al, 1997: 56).



Morley et al (1997: 56) also add that it is possible for an expatriate's acculturating strategy to change over time. They note that the individual may adopt a number of acculturation strategies his adjustment to the foreign culture. A typical sequence of approaches utilised by the newly arrived expatriate is to initially make use of a separation strategy, to find it ineffective, and then to focus his efforts towards a more integrated approach.

5.4.2. Social identity

When the person is required to work and live in an unfamiliar environment in the foreign country, his secure sense of self is disturbed (Eckert, 2006; Punnett, 2002; Marx 1999). The familiar context within which the person's behaviour makes sense is absent. Behaviour that is acceptable and encouraged in the home country may also be frowned upon in the foreign culture.

The unfamiliar influences in the foreign country can pose a risk to the person's self-identity: the person is not as sure of his own identity as before, and experiences feelings of insecurity as a result. The person learns that there is more than one way of living, working and building relations with others. These factors threaten the previously well-formed thinking processes on how to act. He does not even always understand his own behaviour or the emotional ups and downs associated with the adjustment process. The self-identity is disturbed and the person may be required to redefine a 'new self' by incorporating newly acquired learning experiences into the 'old self' (Eckert, 2006; Punnett, 2002; Marx 1999).

As soon as the person interacts more closely with a foreign culture, he experiences friction between his own values and those of the new culture. As the person becomes more involved, he normally develops alternative behavioural patterns. These new patterns also influence his view of himself. The adjustment processes all form part of the personal development experienced by most expatriates while on international assignment (Eckert, 2006; Trompenaars & Hampton-Turner, 2004).



5.4.3. Emotions

Being expatriated to a foreign country has a direct impact on the levels of stress experienced by the individual (Trompenaars & Hampton-Turner, 2004; Nelson-Jones, 2002; Marx 1999). The expatriate is exposed to high levels of psychosocial stress during his relocation into the foreign country, which could potentially lead to him experiencing symptoms of emotional fatigue. According to Kaplan and Sadock (1991), international assignments fall into the category of “severely stressful life events”. The impact of expatriation on the individual’s emotional wellbeing is rated similar to the stress caused by divorce, poverty, and chronic life threatening illness in parents. These are major life changing events that increase the possibility of the expatriate experiencing significant psychological difficulties, for example alcohol and drug abuse, anxiety, depression. In extreme cases the individual may even show symptoms of a condition commonly referred to as ‘nervous breakdown’.

Research conducted by Dowrenwend and Dowrenwend (as cited in Marx, 1999) indicates that a direct correlation exists between the number of life changing events experienced (for example being retrenched, death of a close family member, moving to a new home) and psychological disorders. International managers moving abroad experience several of these stressful life changing events simultaneously: adjusting to new country, a new job, a new home, a new school, etcetera. Consequently, their psychological well-being is placed at risk, which could have a directly detrimental impact on their work performance - and ultimately, the performance of the company. Typical emotions experienced by the expatriate in his adjustment to the new culture in the foreign environment would be mixed feelings, stress, obsession, and depression.



5.5. Factors influencing cross-cultural adjustment

Hodgetts and Luthans (2003) identify four major categories of variables that impact on the adjustment process after the expatriate's arrival in the foreign country:

- Individual factors;
- Job-specific aspects;
- Organisational dynamics and support, and
- Non-work issues.

Black et al (1999) also refer to the above mentioned factors as post-arrival or in-country factors. In this section a discussion will be conducted on each of these categories.

5.5.1. Individual factors

Individual factors are identified as the first important variable that directly influences the expatriate's adjustment after his arrival in the host-country (Hodgetts & Luthans, 2003; Black et al, 1999: 117; Morley et al, 1997: 56). Individual factors that influence cross-cultural adjustment can be summarised in terms of three broad categories:

- **Self-oriented factors:** Self-oriented characteristics refer to the expatriates' levels of self-confidence and their belief in their own ability to interact effectively with the local nationals and the new surroundings in the foreign country (Cascio & Aguinis, 2005; Guthrie & Ash, 2003). Mendenhall and Oddou (as cited in Chan, 1999) also refer to these factors as the "self-dimension", which includes the expatriate's ability to maintain high levels of emotional health and psychological well-being.



Black et al (1999: 117) assert that people who believe in themselves tend to persevere even in the face of mistakes. When they do make mistakes, the person is then able to ask questions about the mistakes they make, they learn from their mistakes, and do not make the same mistakes repeatedly. Therefore, individuals with a strong and healthy self-image tend to persist in adjusting their behaviours, even when these circumstances are less than perfect and may produce negative consequences. The more they try to master new behaviour, the more they have the opportunity to receive both positive and negative feedback about how they are doing and to refine their behaviour until it is effective. The above mentioned assertions are in line with Postulate 2 set in this study, which specifies that a direct correlation exists between the individual's personality traits and the individual's emotional adjustment during the assignment.

- **Relational factors:** According to Hodgetts and Luthans (2003), the second category of individual factors is referred to as relational or other-orientated factors. These characteristics are associated with the individual's ability to meet, interact, and empathise with foreign people. Mendenhall and Oddou (Chan, 1999) define the relationship dimensions as those skills utilised for developing meaningful relationships with host country nationals. They assert that this orientation towards developing relationships with others is very powerful, because host-country nationals are the best source for teaching foreigners how to successfully find their way in their country.
- **Perceptual-orientated factors:** Perceptual-oriented factors refer to the expatriate's ability to observe and appreciate a foreign culture's underlying maps and invisible rules (Black et al, 1999). Mendenhall and Oddou (as cited in Chan, 1999) elaborate on this definition, indicating that perceptual-oriented factors involve the intellectual properties that enable the expatriate to observe and evaluate the host environment and the people living in the country, and to make the appropriate adjustments in order to integrate into the culture in the host-country.



5.5.2. Job-specific factors

Hodgetts and Luthans (2003) identify job factors as the second important post-arrival variable that influences the expatriate's adjustment after arrival in the host-country.

From a domestic work perspective, Brett (as cited in Morley et al, 1997: 55) argues that a person's identity and sense of self are functions of the roles he plays in the work situation and in general society. These roles consist of a series of learned behaviours or routines. The moment the expatriate arrives on an international assignment in a foreign country, his routines and behaviours are directly disrupted and can potentially lead to the individual experiencing emotions confusion, lack of control, and loss of valued outcomes. Brett categorises international assignments as a major life changing event that can potentially have a detrimental impact on the person's emotional well-being.

Trompenaars and Hampden-Turner (2004: 327) state that this adjustment to the new work environment in the host country is a normal and healthy process that needs to be experienced by the individual in order to successfully integrate into the foreign environment. According to Morley et al (1997: 55), the expatriate is successfully adjusted to the foreign work environment when he has established the appropriate behaviours to replace those lost during the expatriation process. These newly acquired behaviours need to produce similar outcomes to those behaviours the expatriate made use of prior to his departure on assignment.

Five job variables can be identified that have an effect on the amount of certainty experienced by the expatriate towards the job, as well as his adjustment to the foreign environment (Black et al, 1999; Morley et al, 1997; Suutari & Brewster, 1997):

- Role clarity
- Role discretion
- Role novelty
- Role conflict
- Role overload



Herewith, a discussion on each of the variables:

5.5.2.1. Role clarity

Role clarity was found the job factor that has the strongest impact on the work adjustment of the expatriate (Harvey & Novicevic, 2001; Black et al, 1999; Grobler & Hiemstra, 1998; Morley et al, 1997; Suutari & Brewster, 1997). Kossuth (1998) defines Role clarity as “*the extent to which what is expected of the individual is clear and unambiguous*”. The opposite of role clarity is referred to as role ambiguity. The degree to which the role expectations are clearly defined has a direct impact on the expatriate’s ability to predict how to behave, which in turn reduces the uncertainty associated with the work situation.

Harvey and Novicevic (2001) suggest that expatriates are confronted with various distinct challenges relating to the clarity of their work roles while on an international assignment. They are of the opinion that expatriates may find it difficult to gain entrance to the ‘inclusionary boundary’ - the informal influence and communication channels in place in the organisation. According to them, all foreign cultures apply different rules towards the extent to which they would trust and show a willingness to trust outsiders from other countries. Consequently, the information required by the newly arrived expatriate on the specific role expectations may be the information which is least likely to be shared by host country nationals with foreigners.

An additional task attribute highlighted by Harvey and Novicevic (2001) that has an impact on role clarity is the complexity of the task that needs to be resolved by the expatriate manager. Three dimensions of the task need to be considered in determining the complexity of the expatriate’s assignment:



- The complexity of the task composition – the range of solutions available, the availability of information sources in relation to the task, the extent of interaction between these sources and the measurements in place to determine successful task completion, and the number of steps or phases required to complete the task;
- Ambiguity of the task content – the availability of the organising principles associated with the task, the expatriate’s previous experience in dealing with the particular task, the likelihood that the task will fail, and the clarity of the cues available in order to organise the information required to solve the task;
- Forms of task presentation – the levels of complexity of the task and amount of time available for the manager to evaluate the available sources of information in making decisions. The higher the overall difficulty of the task, the higher the levels of competence and experience required by the expatriate manager in order to address the cognitive demands associated with the task.

Expatriates appointed in managerial positions also indicated a stronger likelihood to experience higher levels of ambiguity compared to other positions (Harvey & Novicevic, 2001). Due to a lack of sufficient information regarding the sometimes conflicting expectations of the various stakeholders in the organisation, expatriates in more senior positions may be more exposed to role ambiguity. Employees in technical or engineering positions may not experience the same amount of role ambiguity, as their work is not dependent on the context within which it is completed. They also may not need to be in regular contact with host country nationals or other stakeholders in the organisation.

In order to minimise the effect of role ambiguity on the expatriate’s adjustment to the work environment, Frandberg and Kjellman (2005) recommend the use of a more formal job description as an approach in ensuring clearer role clarity during international assignments, and to assist in reducing the levels of ambiguity and confusion related to the relocation process. Frandberg and Kjellman (2005) also suggest that companies should make use of a handover period, where an overlap is established between the contracts of the leaving expatriate and the incoming expatriate in order to ensure a transfer of knowledge and skills.



5.5.2.2. Role or job discretion

A further aspect of the job that assists in improving the expatriate's work adjustment is role or job discretion. Role or job discretion refers to the degree of freedom the expatriates are allowed to have in their positions (Harvey & Novicevic, 2001; Black et al, 1999; Morley et al, 1997; Suutari & Brewster, 1997). Morley et al (1997: 57) indicate that the more the role discretion experienced by the expatriates, the more they will be able to organise their work so they can use past successful behaviours and approaches more easily, which in turn facilitates job adjustment and performance.

Suutari (2003) highlights the prospect of having extended work opportunities and greater job discretion as one of the underlying motives for employees to consider going on international assignments. Black et al (1999) concur with Suutari in this regard, indicating that the majority of expatriates on international assignments do actually experience considerably more discretion in their international assignments compared to the job discretion they occupied in their previous domestic position. They also found that the more senior the expatriate position, the more likely the person is to have discretion in his job.

5.5.2.3. Role novelty

Morley et al (1997: 57) identify role novelty as a significant factor having an impact on the expatriates' work adjustment. Role novelty refers to the differences that exist between the expatriate's previous role in the parent company, and the new role he is required to fulfil on arrival at the foreign operation (Black et al, 1999; Morley et al, 1997; Suutari & Brewster, 1997). Morley et al also indicate that most expatriates experience a considerable amount of role novelty on their arrival at the subsidiaries in the foreign country.



According to Harvey and Novicevic (2001), the cultural context has a direct influence on the way a job is performed. They argue that the entire work environment is impacted by the larger cultural context. The economic and legal institutions of the host country within which the expatriate is required to function are a product of the country's cultural values. The larger the cultural novelty between the home- and host-countries, the more the likelihood for expatriates appointed in approximately similar positions in those countries to experience role novelty.

5.5.2.4. Role conflict

A further aspect identified by Black et al (1999) that could have an impact on work adjustment is the extent to which contradictory expectations or demands are placed on the expatriate. They caution that role conflict should not be confused with role ambiguity. In the case of role ambiguity, what is expected of the expatriate is unclear. In the case of role conflict, what is expected of the expatriate is clear, but different people and interest groups have conflicting expectations of the individual.

In a study conducted by Suutari (2003) among expatriates on assignment, the respondents believed that there were significant levels of role conflict in their work environment. A commonly raised concern was that local superiors and colleagues were insufficiently informed on the role of the expatriate. Local colleagues were also perceived as being suspicious towards the role of the expatriate in the organisation, and were “reporting on them” to head office. In the case of expatriates in managerial positions, the organisational structure in place was often the underlying cause of role conflict, rather than any specific aspects of their job. The reason identified for this tendency was that expatriate managers felt a stronger need to maintain a balance between the needs of the parent company and the foreign operations in their capacity as an intermediary between the two organisations. Expatriates in technical positions showed a stronger tendency to experience role conflict as a result of having to report to more than one superior providing them with contradictory instructions (Suutari, 2003).



5.5.2.5. Role overload

Role overload occurs when too many demands are placed on the expatriate (Morley et al, 1997: 57). In the case where role overload develops, the expatriate will be less able to effectively manage the demands placed on him or her, which in turn could have a detrimental effect on successful role transition. Two typical symptoms associated with role overload is the expatriate experiencing an overload of contradictory demands from colleagues and supervisors, and experiencing difficulty in maintaining a balance in the relationship between the subsidiary and the head office. In turn, these factors could potentially lead to a significant increase in the levels of role conflict and overload experienced by the expatriate. In the study conducted by Morley et al (1997: 61), the majority of expatriates were of the opinion that they did not have enough time to complete the tasks delegated to them, and that they were placed under extreme pressure during the conduct of their work.

5.5.3. Organisational factors

Kubes and Loh (2006) identify organisational climate as a very important variable that influences the expatriate's adjustment after arrival in the host-country. This confirms Postulate 3 made in this study that the organisational climate during the international assignment has a significant influence on the levels of emotional health of the expatriate. Kubes and Loh (2006) identify five organisational factors having an impact on the expatriate's adjustment to an international assignment:

- **Post-arrival cross-cultural training:** The first factor identified by Kubes and Loh (2006) impacting on expatriate adjustment is post-arrival cross-cultural training. Training can help individuals gain the necessary mental maps and understand the rules of a culture; it can also help them practise and develop the behaviours and skills necessary to operate effectively in a foreign culture.



According to Kubes and Loh (2006), training is one of the most important organisational factors that can assist prospective expatriates form realistic expectations before going on international assignment. However, they also note that basic logistical issues occupy the minds of most managers before their international departure. In addition, most of them will not have had recent previous experience in the countries to which they will be sent. As a result, their level of motivation and general capacity to relate to deep cultural information are often not ideal just before transfer.

Therefore, although research indicates that pre-departure cross-cultural training can make a positive contribution to the expatriates' cross-cultural competence, adjustment, and work performance, specific cross-cultural training tends to be more effective when provided in the host country after the expatriate has been in the country for approximately one month.

- **Difference between parent-company and foreign operational culture:** The second organisational factor identified by Kubes and Loh (2006) that affects work adjustment is the extent to which there are differences in the organisational cultures of the foreign subsidiary versus the parent company. The greater the difference between the two organisational cultures, the more difficult the adjustment, and the longer it takes to adjust to the new work environment (Kubes & Loh, 2006; Harvey & Novicevic, 2001).

The external environment at the foreign subsidiary is usually more dynamic compared to the environment at the parent-company in the home country, which makes a flexible, autonomous and decentralised organisational culture more appropriate. However, the company also needs to maintain a balance - between the head office and the foreign operation, as well as between the foreign subsidiary and its external environment.



Where the market in the foreign country changes, the expatriates need to be flexible in their ability to adjust to the changing external environment in order to be successful. A decentralised organisational structure that allows for flexibility would facilitate this. Where the foreign operation is too dependent on the parent company, the effectiveness and flexibility of the expatriates may be negatively affected (Kubes & Loh, 2006; Harvey & Novicevic, 2001).

- **Logistical support provided by organisation:** A further organisational factor that affects the expatriate's adjustment is the extent to which the organisation provides logistical support to the expatriate and the family during their typically frustrating and logistically challenging move from one country to another (Kubes & Loh, 2006). Black et al (1999) agree with Kubes and Loh, indicating that the level of support provided by the company during the expatriation period has a considerable influence on the satisfaction and adjustment of the expatriate. According to Black et al, companies need to give specific attention to the logistical support provided in the areas of accommodation, education and travel, as these issues play a significant role in the extent to which the expatriate adjusts to the foreign environment.

On the other hand, failure by the company to provide such support can lead to the expatriate experiencing unnecessary anxiety, as the person is then required to deal with these issues him or herself. In turn, these stresses relating to issues outside the expatriate's work environment have been shown to have a spill-over effect on the person's work life and performance (Kubes & Loh, 2006). Morley et al (1997: 63) found a strong correlation between the expatriate's satisfaction with the perceived support provided by the company, and his satisfaction with the overseas assignment.



- **Support provided to newly arrived expatriate by foreign operation:** The fourth organisational factor identified by Kubes and Loh (2006) influencing expatriate adjustment relates to the extent to which members of the foreign operation provide social support to the newly arrived expatriate and family. Supportive co-workers can provide information about how to get along in the organisation, as well as provide emotional support while the newcomer gets to know the new environment. Expatriates who receive higher levels of social support from their co-workers, experience lower levels of role ambiguity and role conflict, and higher levels of work adjustment compared to those expatriates who do not have such support available.
- **Communication:** Communication is highlighted by Kubes and Loh (2006) as a fifth organisational factor that influences the adjustment of the expatriate in the foreign environment. They refer to the term “information gap” originally identified by Chorafas in 1967, which refers to the extent to which expatriates are likely to feel “professionally unproductive and personally dissatisfied” due to the distance and the lack of meaningful interaction between the foreign operation and the parent company.

However, Suutari and Brewster (1997) also emphasise the fact that the problems experienced by expatriates in the area of communication are not only related to the “information gap” that may exist between the parent company and the foreign subsidiary. They also identify the expatriate’s ability and willingness to communicate in the local language as a major factor having an influence on communication in general as a factor influencing the adjustment of the expatriate in the foreign environment.



Cascio and Aguinis (2005) suggest that, although the ability to speak the local language in the host country does not automatically lead to successful interaction and communication with local nationals, it does have a positive impact on the expatriate's ability to identify and understand the subtle undertones of the host country culture and norms. Marx (1999) adds to this argument, indicating that the more exposure the expatriate has to host nationals the easier it will be for him to learn the behaviours required to function effectively in the host society. Marx found that expatriates who were willing to learn the local host country language were able to develop a 'conversational currency', a basic literacy in the local language that allowed them to relate more easily to host-country nationals. These expatriates were perceived less as foreigners by the host-country nationals, and were more readily involved into the local business environment.

5.5.4. Non-work variables

Three factors are identifiable that have a direct influence on the expatriate's adjustment to the non-work environment (Punnett, 2002; Black et al, 1999, Chan, 1999; Suutari & Brewster, 1997):

- Spouse and family adjustment;
- Culture novelty;
- The social support from other expatriates and host-country nationals.

5.5.4.1. Spouse and family adjustment

Various studies indicate that the spouse and family's ability to adjust to the foreign environment impacts substantially on the expatriate's adjustment in the new work and social environment (Brotchi & Engvig, 2006; Punnett, 2002; Webb, 1996). One of the earliest studies conducted by Tung (1987) found that family-related issues are the most commonly mentioned causes for expatriate failure, with specific reference to the spouse's or family's inability or unwillingness to adapt to the foreign physical and social environment.



Brotchi and Engvig (2006) confirm this finding, indicating that poor spouse adjustment is still found to be the single biggest cause for expatriates terminating their foreign assignments early. Brotchi and Engvig (2006) found that nearly half of 300 companies included in their survey have had to repatriate expatriate families before completion of their contracts as a result of the spouses' inability or unwillingness to adjust to the foreign environment.

Quite dramatic statistics relating to the influence of the spouse on expatriate failure were found in a study conducted by General Motors Acceptance Corporation Global Relocation Services (as cited in Cheng, 2002), which indicated that 92 percent of expatriates cited spousal dissatisfaction as a key reason for assignment failures, and 90 percent referred to family concerns as the underlying factor.

Studies indicate a consistent relationship between the adjustment of the expatriate and his spouse (Brotchi & Engvig, 2006; Cheng, 2002, Punnett, 2002; Beaverstock, 2000). However, Brotchi and Engvig (2006) emphasise that it is impossible to ascertain the exact cause-and effect interaction between the adjustment of the expatriate and that of the spouse. They view the relationship as being reciprocal - the adjustment of the employee and the spouse mutually influence each other.

Punnett (2002) argues that the spouse has the most difficult role of any family member during an international move. Prospective expatriates are often excited about the career development potential of an international assignment. Their spouses may not be as enthusiastic about the prospects of being sent to a foreign country. For the expatriate, the organisation and role structure extends from the parent company to the foreign operation, and school provides the children with continuity and routine. On the other hand, the spouses are often required to give up some of the closest and most important parts of their lives, including their careers, their friends and social support networks – with specific reference to family and relatives.



Unlike the support provided to the expatriate from a job and organisational point of view, the spouse is generally provided very limited support in determining how to survive and succeed in the new environment and culture (Suutari, 2003). The spouse is also required to face the issues of establishing a home environment and creating an infrastructure for the family in the new country. Beaverstock (2000) indicates that addressing challenges such as buying groceries, organising transport, making new friends, and managing the children's education causes a significant amount of stress among expatriate spouses.

Another concern of the expatriate spouse would be the children's well-being and schooling (Punnett, 2002). The children are influenced as much by the turmoil associated with culture shock by moving away from home as their parents. They have concerns over their integration into the new school environment, their own identity in a new social environment, and their need to make new friends. A point mentioned by Suutari (2003) that needs to be taken into account when considering family issues would be the age of the children. Suutari quotes one of the expatriates included in his study who indicated: *"From my experience I would not recommend taking teenagers abroad. It is very tough to get torn away from your friends at that age. We wanted to broaden our child's mind but negative school experiences led to a very negative attitude to international issues"*.

The impression may be created from the above mentioned discussions that only difficulties and negative consequences can be associated with the expatriation of the expatriate spouse and her family on assignment to a foreign country. In this regard, Suutari (2003) cautions that any discussion on the difficulties related to expatriate family adjustment needs to be balanced by an analysis of the benefits and personal growth opportunities involved with exposing expatriates and their families to such international experiences. Suutari highlights a number of positive family implications: *"Multiculturalism is richness. There, the children learn languages and become familiar with different cultures. Through minor difficulties one gets enormous opportunities. There are many more positive effects than negative ones. Although the international environment is seen to differ from the home country settings, the difference may also be an enrichment in one's life"*.



Other areas identified by Suutari (2003) where personal development typically takes place among expatriate spouses and families would be emotional resilience, ability to cope with ambiguity and confusion, open-mindedness, self-confidence, and patience.

As can be seen from the above mentioned observations, the extent to which the expatriate spouse and family are able to successfully adjust to the living conditions in the foreign country will have a direct impact on the expatriate's own ability and willingness to remain focused and committed to the completion of the international assignment.

5.5.4.2. Culture novelty

According to Trompenaars and Hampton-Turner (2004), general differences between the cultures in the host country and the expatriate's home country increase the expatriates' uncertainty about how to behave appropriately, leading to adjustment difficulties. These differences hinder interaction and non-work adjustment more than they hinder job adjustment. Van Weerdenburg (2006) also refers to these differences as culture toughness, or culture distance.

Culture novelty has a negative impact on interaction and general non-work adjustment for two reasons (Trompenaars & Hampton-Turner, 2004). The first reason is that the greater the number and degree of differences between two cultures, the more mistakes people make as they try to live and work in the new culture. The more depressed people become about making these mistakes, the more defensive and angry they turn out to be towards host-country nationals, who are often seen as the cause of their troubles.

The second reason why culture novelty has a negative impact on adjustment is that the ways in which differences are discovered or learned, the way mistakes are recognised, or how apologies for mistakes are made, may also be different.



According to Trompenaars and Hampton-Turner (2004), substantial differences exist in the cultures of different countries. The bigger the difference between the host culture and the individual's own culture, the more the expatriate may experience confusion as to what behaviours are appropriate in the host culture. Eckert (2006) argues that expatriates can adapt successfully by studying the actions and behaviour displayed by host country nationals they have contact with in their work and social environment. However, in order for the expatriates to learn from these behavioural models, they need to become aware of them and view them as agreeable people whose behaviours are worthwhile duplicating. Eckert (2006) also argues that the greater the difference between the cultures, the smaller the probability that the acculturating expatriate will consider host country nationals as appropriate behavioural role models. Consequently, the expatriates would show a decreased willingness to learn from these individuals. In the process, their adjustment to the local culture is also inhibited.

An effective way for companies to assist their international assignees in overcoming the obstacles of adjusting to the cultures of the particular host countries is to make use of cross-cultural training (Cascio & Aguinis, 2005). Cross-cultural training has already been discussed on a number of occasions in this research document. Paragraph 4.3.2.2 in Chapter 4 provides a more detailed discussion on cross-cultural training.

5.5.4.3. Social support from expatriates and host-country nationals

A third non-work factor having an important relationship to cross-cultural adjustment is the social support received from other expatriates and host-country nationals outside the work place (Punnett, 2002; Suutari & Brewster, 1997). Such support can provide newly arrived expatriates with information about how to get along in the culture, as well as emotional support while they find their feet. In this regard, a study conducted by Black et al (1999) found that expatriates who had received higher levels of support had significantly higher levels of interaction and general non-work adjustment.



5.6. Summary

As was mentioned during the introduction to this chapter, Adler (1999) highlights the expatriate's integration into the foreign environment as the most important phase in the international career cycle. In Chapter 5 an attempt was made to highlight the various phases and challenges the expatriate and his family are required to adjust to during their integration into the foreign environment. Attention was also given to the influence of culture shock on the individual and the impact it has on the person's adjustment from a personal, work, and social or cultural perspective. Lastly, a discussion was also conducted on the various factors, both from a work and a non-work perspective that impact on the expatriate's successful integration and achievement of his international assignment objectives.

It becomes evident from the discussions in this chapter that the integration process of the expatriate and his family into the local work and living environment in the foreign country is a complex one that needs to be managed very carefully - particularly taking into account the high failure rates among employees being sent on international assignments, as was discussed in Chapter 3. The discussions form the basis for Postulate 3 set in this study, which specifies that the work and social climate during the international assignment has a significant influence on the levels of emotional health of the expatriate.

In Chapter 6, the final phase in the expatriate's international career cycle is discussed namely the repatriation of the expatriation back into the home country on completion of his international assignment.



Chapter 6

Repatriation

6.1. Introduction

Expatriates typically undergo a sequence of predictable stages in relocating from a domestic position in their home country, to an international assignment at a foreign subsidiary and back home again. This process is also referred to as the expatriate international career cycle. The first two phases in this career cycle are the pre-assignment selection and preparation phase, and the actual period on the international assignment in the foreign country. These two phases were investigated in Chapters 4 and 5. The third and final phase in the expatriate international career cycle is the repatriation of the expatriate back to the host-country and company headquarters on completion of his international assignment (Frandsberg & Kjellman, 2005). This final phase will be discussed in Chapter 6.

An important observation made by Black et al (1999) is that not all international assignments end with the expatriate being repatriated back to the home country. The person may also be transferred to another overseas position on completion of his international assignment, especially if the company makes use of international assignments to build an international team of managers for a geocentric staffing policy (the staffing approach where the best people are utilised for the key positions throughout the organisation, regardless of their nationality).

It is often believed that returning to the home country after completing an international assignment in a foreign country should be an “easy and straightforward process”. However, ‘coming home’ is unfortunately not that simple for many returning expatriates (Cascio & Aguinis, 2005). Adler (1997) agrees with Cascio and Aguinis in this regard, quoting a study conducted by the Business International Corporation, which states:



“Repatriating executives from global assignments is a top management challenge that goes far beyond the superficial problems and costs of physical relocation. The assumption is that since these individuals are returning home they should have no trouble adapting. However, experience has shown that repatriation is anything but simple”.

A joint survey conducted by the National Foreign Trade Council and Windham International in the United States involving 264 companies employing a total of 75 000 expatriates worldwide indicated the following repatriation figures (Stanoch, 2006):

- 40 percent of repatriates leave the company within two years after their return;
- 68 percent of companies do not provide employment security on assignment completion;
- 75 percent of returning expatriates indicated being appointed into lower level positions than they had while on foreign assignment;
- 40 percent of the repatriates expressed dissatisfaction with the extent to which companies effectively utilised the valuable experience and skills they had gained while on assignment after their return to the home country.

A study conducted by Suutari (2003) on expatriates in European multi-national companies concurs with the above mentioned findings, indicating that the majority of expatriates in the survey were willing to consider leaving the employment of their company for another position in another company after returning from international assignment, and that a significant majority of them have seriously contemplated such change after their repatriation.

Cascio and Aguinis (2005) even go so far as to state that as high as 50 percent of returning expatriates leave their employers within two years after their return. These statistics are confirmed by Stahl et al (2002), who found that some European and U.S. companies have lost between 40 percent and 55 percent of their repatriates within three years after repatriation through voluntary turnover.



These observations support a statement made by the Wall Street Journal (Adler, 1997) after completing a survey on thirty-four global companies, "*Bosses might quickly become sensitive if they added up the cost to the company of unhappy returning employees.*"

Taking into account the statistics on the number of returning expatriates leaving the employment of their companies after returning to the home country, it would be wise for multi-national organisations to obtain a well-founded understanding of the difficulties experienced by the expatriate and his family on their return to the home country from an international assignment. In Chapter 6 an investigation will be conducted on the repatriation process expatriates typically go through during their reintegration back into the home country on completion of their international assignments. This will be done with specific reference to Hypotheses 1b and 1d established in this study, which stipulate that the expatriate's levels of emotional health (sense of meaning and hardiness) decreases from six months into the assignment to after completion of assignment.

6.2. The repatriation process

The process of repatriation can be divided into four interrelated phases, namely preparation, physical relocation, transition, and readjustment (Frandsberg & Kjellman, 2005; Dowling et al, 1999).

- **Preparation** entails planning ahead for the future and conducting investigations to obtain relevant information on the new position in the parent company. The company may consider providing the expatriate with a checklist of aspects that need to be taken into account before being repatriated back to the home country. This can be done as part of a more comprehensive preparation process for the expatriate and their families prior to their repatriation to the home country.



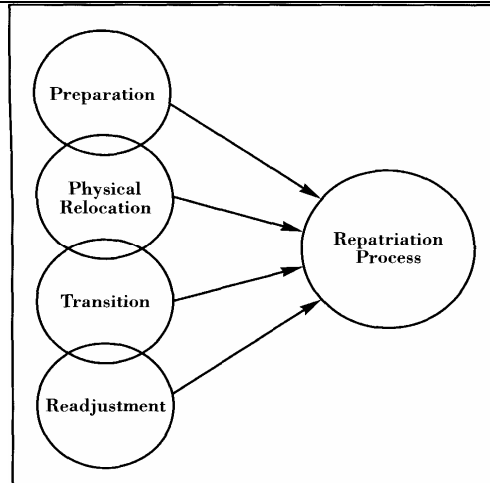
- **Physical relocation** refers to removing personal belongings, saying goodbye to colleagues and friends in the host country, and travelling to the next position (which is usually at the headquarters in the parent country). During this stage, the company can offer comprehensive and personalised relocation assistance in order to reduce the amount of anxiety experienced by the expatriate. Most international companies use removal firms or relocation consultants to handle the physical relocation process.
- **Transition** entails moving into provisional housing in the home country, arranging for more permanent accommodation and education, and dealing with other administrative issues.
- **Readjustment** entails facing previously familiar surroundings after living and working in a foreign country for a significant period of time. The process can be defined as the expatriate's move from the foreign country back into his home country. It involves readapting to the work and living conditions in the home country. It also involves the person's reintegration and interaction with people in the home culture (Frandsberg & Kjellman, 2005; Dowling et al, 1999).

The readjustment phase is often the most traumatic, but also the least understood and most poorly managed phase in the repatriation process. The returning expatriates do not always realise that during their expatriation, their own country has changed, their organisation has changed, their friends and family may have changed and, most importantly, they themselves have changed. In addition, companies cannot always guarantee the repatriate any job on his return (Stanoch, 2006; Frandsberg & Kjellman, 2005; Dowling et al, 1999).

The above mentioned factors could lead to the expatriate experiencing the repatriation process (both from a professional and a personal perspective) as the most challenging aspect of the entire international assignment, even more severe than their initial adjustment to the foreign country on their arrival as expatriates. This readjustment is often referred to as "reverse culture shock" (Stanoch, 2006; Beaverstock, 2000).

A graphical display of the phases can be seen in Figure 6.1.

Figure 6.1.: The repatriation process



(Dowling et al, 1999)

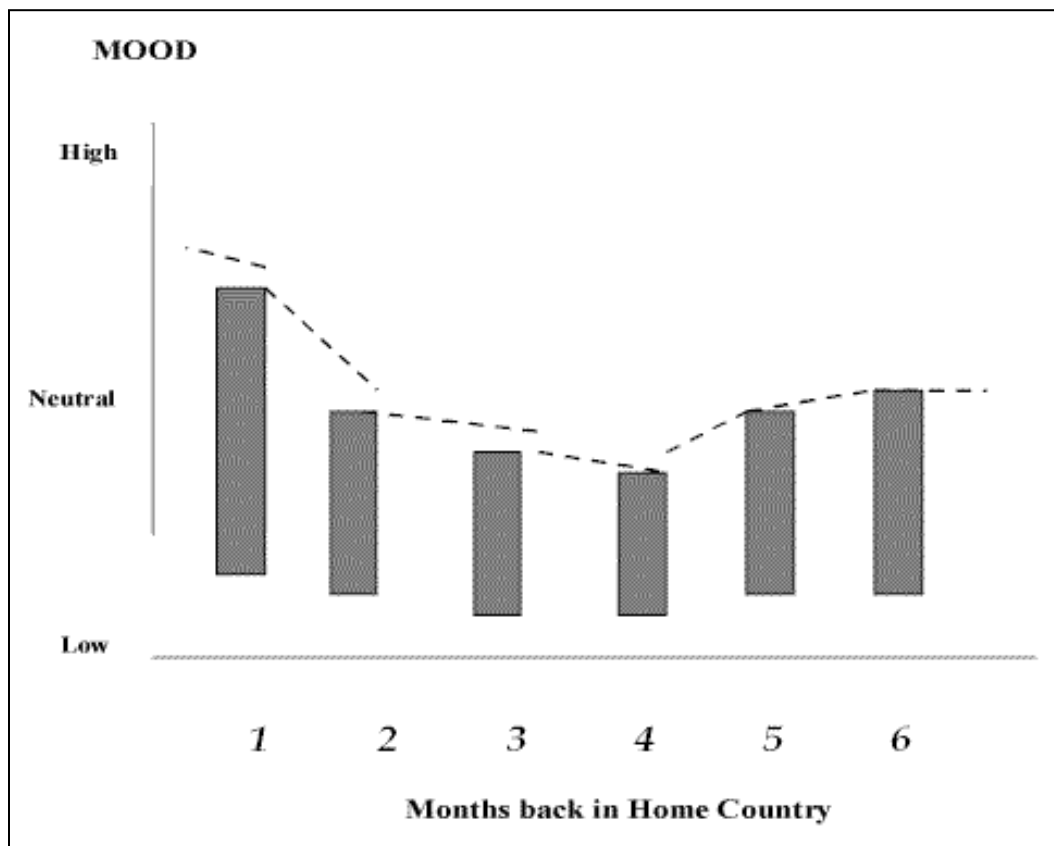
6.3. Reverse culture shock

During the repatriation process, returning expatriates experience adjustment phases similar to the culture shock they experienced during their initial arrival on assignment in the foreign country. This adjustment process back in the home country is referred to as reverse culture shock. Bampton (2003) defines reverse culture shock as “*the psychological process of readapting to one’s home culture on return after being away from the home country for a longer period of time*”.

In this adjustment process back in the home country, returning expatriates experience high spirits and enthusiasm on their initial arrival home. However, this positive mood disappears quickly and is replaced by a very low and depressive mood, before returning slowly to a normal level of emotional well-being. For most returnees the initial high mood lasts less than a month and many report it lasting only a few hours. The low period therefore begins earlier in re-entry than in the entry transition. Repatriates' lowest times usually occur during the second and third months after their return (Stanoch, 2006; Frandberg & Kjellman, 2005; Marx, 1999).

Chan (1999) graphically describes the re-entry adjustment curve as follows:

Figure 6.2.: Re-entry adjustment curve



(Chan, 1999)

During the transition from the country of assignment back into the home country, expatriates and their families face previously familiar surroundings after living abroad for a significant period. When initially leaving on the international assignment in the foreign country, expatriates generally expect new and unfamiliar situations. On their return to their home country, the expatriates do not expect anything unfamiliar (Chan, 1999).



Most returnees expect to move back easily into their previous organisation, job, and lifestyle. However, they return neither to the world they left originally, nor to the world they are expecting. While on assignment in the foreign country, the expatriate develops and changes, the organisation changes, and the country changes. In addition, during the culture shock phase of adjusting to another country, the expatriate often idealises the home country, remembering only the positive side of being home. When returning home, the person faces the real changes; the divide between the way things were and the way they are now, and the divide between their idealised memories and reality (Stanoch, 2006).

As a result of the above mentioned changes, returning expatriates often describe re-entry into the home country as an even more difficult transition than their initial entry into the new country (Frandsberg & Kjellman, 2005). A study conducted by Black et al (1999: 203) indicated that 60 percent of American, 80 percent of Japanese, and 71 percent of Finnish expatriates experienced repatriation adjustment more difficult than the original adjustment in the foreign country.

6.3.1. Factors influencing reverse culture shock

Several factors contribute to the reverse culture shock experienced by the expatriate. A study conducted by Forster (as cited in Beaverstock, 2000) indicated the following factors as the principal concerns identified by expatriates returning to their home country on completion of their international assignments:

Table 6.1.: Principle concerns of expatriates returning to their home countries

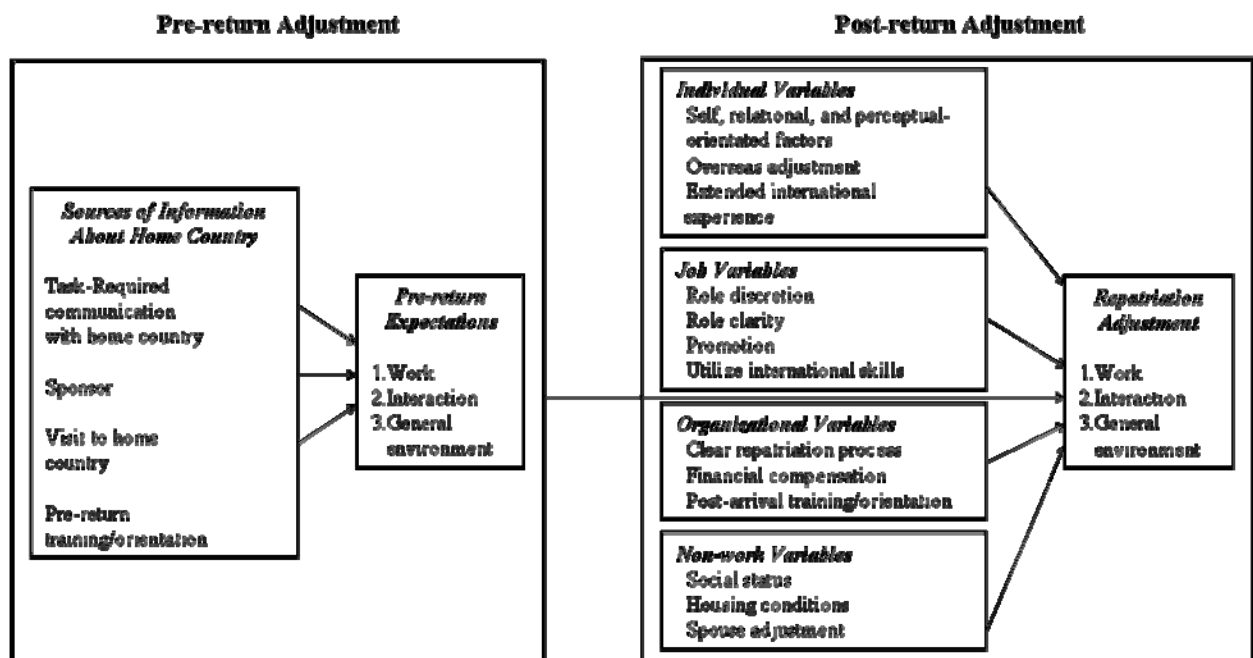
Concerns	Percentage being 'Extremely' or 'Very' concerned
1. Problems of career or employment	63%
2. Changes in standard of living	59%
3. Performance in current position	58%
4. Relationships with colleagues	55%
5. Evaluation of work by superiors	49%
6. Adapting to life back in the home country	48%
7. Support from the company after repatriation	47%
8. Disruption to home and family life	26%
9. Buying or selling houses	18%
10. Relationship with superiors	17%

(Forster as cited in Beaverstock, 2000)

Commenting on the above mentioned figures, Beaverstock (2000) indicates that approximately 60 percent of the factors mentioned by returning expatriates are job-related issues and 40 percent are other factors in the personal and social environment. These figures are in line with the findings of Frandberg and Kjellman (2005), who indicate that returning expatriates and their families are required to adjust to three basic areas when they are repatriated to the home country on completion of the international assignment. The expatriates firstly need to adjust to a new job and work environment. Secondly, the expatriates and their families need to adjust to communicating with home-country co-workers and friends. Thirdly, the expatriates and their families face the problem of readjusting to the general living environment in the home country.

The expatriate's repatriation adjustment can be divided into two distinct phases, namely anticipatory or pre-return adjustment before transferring home from an international assignment, and adjustment after the expatriate and his family have arrived back in the home country and at the parent company – also referred to as post-return adjustment (Frandsberg & Kjellman, 2005; Meier, 2005; Black et al; 1999). Black et al (1999) make use of a model to graphically illustrate the factors that affect repatriation adjustment before the expatriate returns home, and those factors that influence adjustment after arrival in the home country. The expatriate repatriation adjustment process can be seen in Figure 6.3 below:

Figure 6.3.: Expatriate repatriation adjustment process



(Black et al, 1999: 211)



As depicted in Figure 6.3, the factors that affect repatriation adjustment can be categorised into five groups, namely:

- Sources of information about changes in the parent company and in the home country;
- Individual factors applicable to the expatriates prior to their repatriation to the home country;
- Job variables;
- Organisational factors;
- Non-work variables that affect cross-cultural adjustment after returning home.

A discussion on each of the above mentioned factors having an influence on the returning expatriate's adjustment follows:

6.3.1.1. Factors influencing pre-return repatriation adjustment

Certain mental changes start taking place within expatriates even before they return to the home country (Frandsberg & Kjellman, 2005; Stahl et al, 2002; Black et al, 1999). The expatriates start making anticipatory changes in their mental maps of what they expect work and life will be like in their home country. These anticipatory adjustments are similar to the ones made by the expatriate prior to his initial departure on the international assignment to the foreign country.

A number of potential sources of information are available that can be utilised by the expatriates and their families in order to assist them in modifying their mental maps on the home country before they actually return (Frandsberg & Kjellman, 2005; Stanoch, 2005; Black et al, 1999). These include information exchange between the parent company and the expatriate, mentors at the parent company, regular visits by the expatriate to the home country while on international assignment, as well as pre-return training and orientation by the company.

6.3.1.2. Factors influencing post-return repatriation adjustment

After expatriates return to the home country on completion of their international assignments, several factors can facilitate or inhibit their re-adjustment to the work, social, and general culture in the home country. These factors can be grouped into four categories, namely: individual, job, organisational, and non-work categories (Frandsberg and Kjellman, 2005; Black et al, 1999).

i. Individual factors

Several of the individual factors relevant to the re-adjustment of the expatriate back in the home country are similar to those applicable to the expatriate's initial cross-cultural adjustment to the foreign environment in the host-country (Stanoch, 2006; Beaverstock, 2000; Black et al, 1999).

Ironically, Trompenaars and Hampton-Turner (2004) indicate that the more expatriates are successful in integrating themselves into the foreign country, the bigger the possibility that they may experience significant adjustment challenges during their repatriation back to the home country. Stahl et al (2002) agree with Trompenaars in this regard, indicating that expatriates and their families who have successfully completed assignments in countries very different from the home country and who have stayed overseas for extended periods tend to be more prone towards experiencing adjustment problems on their return to the home country. The more the expatriate acquires the mental maps and rules of a foreign culture, the more difficulty the person will experience in reverting back to the maps and rules relevant to the home country.



ii. Job-related factors

A common mistake made by many expatriates is to expect a hero's welcome at the parent company after returning from a successful international assignment. Expatriates also often agree going on the international assignment with the expectation of being promoted after successfully working overseas. However, the reality of the situation is that these returning expatriates may be having unrealistic expectations of the reception they will get back in the parent company on their return (Cascio & Aguinis, 2005).

From an employment perspective, research indicates that returning managers often experience major difficulty re-integrating back into the parent company work environment. Antal (2001) asserts that the returning expatriate's professional re-entry into the work environment has often been found to be more difficult than his personal re-integration, particularly for people returning to multi-domestic companies where international experience is not viewed important in achieving success in the corporate environment.

According to Caligiuri and Lazarova (2001 as cited in Suutari, 2003), the difficulty of identifying suitable positions for returning expatriates is of key importance in their successful repatriation. They found that up to 86 percent of the repatriates' overall level of satisfaction with their repatriation could be attributed to one factor: the impact of the international assignment on their career. They also found that 78 per cent of expected repatriation problems involved job and career issues after repatriation. This situation is compounded by the fact that only 4.3 percent of North American multinational firms provide their international assignees with more than six months' notice of their return home, 30 percent of expatriates receive approximately three months' notice, and 64 percent were informed of their repatriation at short notice (up to one month) (Black et al, 1999). These statistics indicate that companies tend to spend very little time and energy in effectively planning the reintegration of the expatriate back into the parent company work environment.



The following job-related factors play a key role in the expatriate's reintegration into the parent company during repatriation (Frandsberg & Kjellman, 2005; Adler, 1997):

- **Out-of-sight, out of mind syndrome:** Jassawalla et al (2004) assert that more than fifty percent of expatriates experience the "out of sight, out of mind" syndrome on their return from their international assignments back into the parent organisation. The occurrence of the syndrome seems to increase significantly in multi-domestic companies, where more than two-thirds of the returnees complain of suffering from the "out-of-sight, out-of-mind" syndrome.
- **Poorly planned return job or limited career opportunities:** As a result of the haphazard approach utilised by companies in meaningfully incorporating the repatriate back into the parent company, the returning expatriates themselves experience difficulty integrating the skills and experience that they have gained while on international assignment into the corporate environment at the parent company (Frandsberg & Kjellman, 2005; Stoltz-Loike, 2002; Antal, 2001).
- **Promotion disappointments:** The majority of people who accept international assignments believe that the assignment will lead to increased career opportunities and growth on their return to the home country (Stahl et al, 2002). However, research indicates that no significant statistical correlation exists between expatriation and career progression (Cascio & Aguinis, 2005; Jassawalla et al, 2004). The majority of returning expatriates do not get promoted on their return from international assignments, and maintain a similar or lower level position to that which they had before leaving for their international assignments (Black et al, 1999).
- **Poor utilisation of international management skills:** International skills gained by the expatriates during their assignments are very often under-utilised on their return to the parent company (Cascio & Aguinis, 2005: 452; Jagatsingh, 2000). The returning expatriates often find that both the organisation and their colleagues may not be very interested in the skills and experience that they have gained while on assignment.



- **Reduced autonomy and role clarity:** Returning expatriates often complain of the “fish pond syndrome”, which refers to the loss of autonomy and authority that they experience on their return to a position in the parent organisation (Stanoch, 2005). As a result, returning expatriates experience significant levels of frustration, which leads to a significant number of repatriates leaving the employment of the company a few months after their return to the parent company (Antal, 2001; Jagatsingh, 2000).

iii. Organisational factors

The returning expatriate’s transition from the organisational culture, assumptions, and behaviours in the foreign subsidiary to the cultural dynamics in the parent organisation can be difficult and stressful. According to Antal (2001), this transition causes returnees to experience organisational culture shock at the same time as they are experiencing personal and societal culture shock.

The parent company’s overall approach to the repatriation process can have a significant impact on the expatriates’ work adjustment after their return home (Antal, 2001; Black et al, 1999). However, Meier (2005) also emphasises that the home company has to deal with certain practical situations that will have an impact on its ability to effectively integrate the returning expatriates effectively into its management structures. Meier (2005) identifies five major problems that can have a direct impact on the company’s effectiveness in re-establishing the returning expatriates into meaningful positions in the parent company:

- During the expatriate’s assignment in the foreign country, the parent organisation may have gone through restructuring that lead to his position becoming redundant;
- The organisation may have been required to embark on a rationalisation or retrenchment exercise, and may be considering ways to reduce the number of more mature employees;



- The expatriate's original position or role in the parent company may have changed substantially or may have been removed altogether while he has been working abroad;
- The expatriate may not have been informed adequately on the above mentioned changes, or may not have received sufficient pre-repatriation training prior to his return to the parent company;
- The expatriate may have unrealistic expectations about his career prospects after his return to the parent company.

On a more informal level, the returning expatriate may encounter changes in the internal information channels and the way business gets done in the parent company (Beaverstock, 2000). Technological advancements in the company's systems and processes may also lead to the repatriate's technical skills and knowledge being outdated. Unless there was sufficient contact between the parent company and the expatriate during the overseas assignment, the person is typically unprepared for these changes. Coupled with the other job-related problems as discussed earlier, these changes make the repatriate's adjustment to the work environment in the parent organisation a difficult process.

Antal (2001) indicates that the factors having an impact on the repatriate's adjustment to the work environment in the parent company can broadly be placed into three categories, namely:

- **Unclear repatriation process:** The majority of returning expatriates are of the opinion that their companies communicated a very unclear picture of the repatriation process. They typically express concern regarding the information available to them on positions available in the parent company, career progression opportunities, compensation equity, taxation assistance, etcetera (Frandsberg & Kjellman, 2005; Jassawalla et al, 2004). Beaverstock (2000) asserts that the overall ambiguity and confusion of the repatriation process within companies is largely a reflection of a non-strategic approach taken towards international assignments.



- **Loss of status and money:** Expatriates receive many additional expatriate benefits such as overseas allowances, company-sponsored accommodation and transport (often more exclusive than their own houses and cars in the home country), tax benefits, etcetera (McCallum, 2004; Van Heerden & Wentzel, 2002). When these expatriates return to the parent company on completion of their international assignments, these benefits associated with expatriation fall away, and they are required to resume their lives at a level that may be considerably less comfortable than what they had grown used to while on assignment (Cascio & Aguinis, 2005; Antal, 2001; Black et al, 1999). This sudden reduction in income available to the repatriate, as well as the increased cost of living in the home country compared to when the expatriate originally went on assignment, place serious pressure on the repatriates and their families in their attempts to reintegrate back into the home country. In addition, the family is also required to build a new home with increased costs for accommodation, education, transport, accommodation, furniture etcetera.
- **Lack of repatriation training:** Black et al (1999) assert that training and orientation after an international assignment can enhance the returning expatriate's adjustment into the parent company. However, they also indicate that multi-national companies do not give systematic attention to the repatriation process. Therefore, very little training and orientation is provided to expatriates after their return home. This lack of company-provided training and orientation leads to the returning expatriates taking much longer to obtain the relevant information that will enable them to find their feet, both in the parent company, and in their interaction with home-country people in the changed living environment.

iv. Non-work factors

Three primary non-work factors influence the returning expatriates' adjustment in the home country on their repatriation (Black et al, 1999). A discussion on the above mentioned factors follows:



a. Social factors

On their return to their home environment, expatriates and their families may feel alienated in their own country, especially if they have been out of contact with their family, friends, and local events. During their international assignments, the expatriates and their families may have enjoyed interaction with the social and economic elite in the host country. In addition, they may have developed a broader cultural perspective, which enables them to compare home country conditions with other living environments and ways of life (Bampton, 2003).

On their return, the expatriates lose the formal status of being foreigners. Black et al (2003) indicate that approximately 43 percent of returning expatriates and their families experience a significant drop in social status on their arrival back in the home country, while fewer than 4 percent of them experience an increase in social status relative to their status during the international assignment. These statistics indicate that repatriated expatriates and their spouses are less likely to be treated as guests of honour at social and recreational functions, with family members and friends showing little interest in their experiences while on assignment. In direct contrast to their expectations, they are much more likely to be faced with family, old friends, and colleagues who are not really interested in hearing about their expatriate experiences (Dowling et al, 1997). In the process, it often occurs that the person experiences increased levels of disappointment, loneliness and emotional isolation. In severe cases, this drop in social status and miscommunication during the repatriation process could lead to expatriates and members of their families withdrawing themselves from others in the home country on both a social and a psychological level.



Additional aspects that the returning expatriates are required to deal with are the changes that have taken place in all parts of the social environment in the home country while they were on assignment. These changes may include new political dispensations, increase in traffic, new educational systems, changes in social groups, etcetera. The changes that have taken place in the home country can sometimes be so significant that the returning expatriates may feel like they are entering a whole new and foreign environment – as if they are newly arrived expatriates again in a foreign country (Bampton, 2003).

b. Accommodation issues

Harvey (as cited in Chan, 1999) indicates that changes in the accommodation conditions experienced by the returning expatriates and their families can significantly influence their repatriation adjustment. Harvey identifies three major issues that influence the expatriates' perceptions towards accommodation on their return.

The first factor emerges in the case where the expatriate had rented out their home-country house during the international assignment. On their return, the expatriates and their families are often required to live in temporary accommodation during the first few weeks to repair the damage caused to their house by the people who rented the property from them. The financial implications involved with renovating their properties on their return can also be significant, and relatively few companies are willing to compensate repatriates for these expenses and losses.

Secondly, repatriates often sell their homes before leaving on the longer term international assignments. On their return, company policies and the challenges of living in hotels or with relatives often drive them to find suitable accommodation as soon as possible after repatriation. In the process, the inconvenience and stress associated with the entire family staying in hotel accommodation or with relatives often lead to returning expatriates making the wrong decisions when buying new homes.



A third factor to be taken into account would be when the expatriates had sold their homes before the assignment, and where house prices have increased in their home country during their absence. The returning expatriates are then required to buy a house similar to the one they used to live in, but at a much higher price.

c. Adjustment of the spouse and family

Chan (1999) indicates that many of the pre-departure and post-return factors applicable to the repatriation process are equally relevant to the expatriates and their spouses/families. However, Punnett (2002) also cautions that certain important and unique factors such as schooling that influence the adjustment of the family in the home country do not necessarily have such a significant impact on the expatriate him/herself. As a result, these factors are often overlooked by expatriates and international organisations, or are not viewed as being very important.

Senior managers in the company are also sometimes of the opinion that the organisation should not intrude into the personal lives of employees. Punnett (2002) clearly cautions against companies making use of this reactive approach towards the expatriate families, indicating that the company by default intruded into the expatriates' family lives by asking the expatriates and their families to go on the international assignments.

A significant problem experienced by expatriate spouses on their return would be their re-establishment of social networks with old friends, particularly where the family has been repatriated to a different city or town in the home country. Those spouses who return to their pre-assignment homes may find that old friends have moved away, or have developed other interests and friends. Spouses may also find that they experience difficulty connecting with the old friends, with the friends not understanding and showing little interest in their accounts of experiences they may have had as expatriates (Jassawalla et al, 2004; Punnett, 2002).



A second serious problem experienced by expatriate spouses on their return is their reintegration into the workforce in the home country. In this regard, a study conducted by Black et al (1999) indicate that on average 63 percent of expatriate spouses included in their study were actively working before going with the expatriates on the international assignments, 16 percent worked during the assignment, and 42 percent of the spouses worked again on their return to the home country. These statistics suggest that spouses make significant career sacrifices to go on international assignments, but many still wish to continue with their careers on their return.

Commenting on the above mentioned statistics, Frandberg and Kjellman (2005) state that expatriate spouses in many cases experience difficulty finding work immediately after international assignments. Often these challenges are related to the loss of professional skills (due to work permit restrictions spouses are often not allowed to work in the host countries) or the lack of business contacts in the home country (due to their extended absence).

Expatriate spouses also experience difficulty in finding suitable positions when potential employers have doubts on how long they will remain in their employment before they go on other international assignments in the near future. An additional challenge faced by spouses would be the difficulties associated with establishing a home and helping children to adjust, which leaves limited time to search for a job as well.

Taking into account the potential difficulty of finding appropriate work after expatriation, Frandberg and Kjellman (2005) comment that it is unfortunate that very few multinational organisations offer any job-finding assistance to spouses after the spouses have made significant career sacrifices to enable their husbands to go on and successfully complete their international assignments. From a South African perspective, a survey conducted by Van Heerden and Wentzel (2002) indicates that approximately 10 percent of South African companies provide some kind of assistance to the expatriate spouses in finding jobs on their return. These statistics compare favourably with 15 percent of companies in Finland and 2 percent of companies in the United States (Black et al, 1999).



A further important factor having an impact on the family's adjustment would be the difficulties experienced by children in re-integrating themselves into schools in the home country, and becoming accepted in peer groups (Chan, 1999). As a result of these difficulties, the returning children frequently experience academic problems. Chan identifies teenage children in particular as high potential candidates to experience difficulty in re-integrating back into the home-country schooling environment.

Suutari (2003) highlights a number of occasions where the children had actually adjusted very well to the foreign country, but experienced major difficulties readjusting in their home countries on their repatriation. Suutari uses the example of a child whose parents moved abroad on an international assignment while he was still at a very young age. In this particular case, the child started his socialisation process in the host culture and as a result experienced major problems in adjusting to his parents' original home culture.

A particular problem experienced by the children of South African expatriates who are sent on international assignments in the northern hemisphere, is the fact that they are normally placed in international schools in the host country. These international schools function according to the northern hemisphere school calendar which commences during August or September each year. On their repatriation to South Africa, these children are often required to either move up a school grade or repeat a grade due to the fact that the South African educational system functions according to the southern hemisphere school calendar that commences in January and ends in December (Van Aswegen & Coates, 2006; Van Heerden & Wentzel, 2002).

As becomes evident from the above mentioned discussions, the extent to which the spouse and family are able to re-integrate themselves back into the home country has a significant influence on the ability and willingness to adjust to the work environment in the home company. This is confirmed by research conducted by Frandberg and Kjellman (2005) on repatriates and their families, which indicates a strong correlation between the expatriate family's successful repatriation adjustment and the employee's repatriation at work, which in turn, has a positive impact on the person's overall work performance.



6.4. Repatriate integration into parent company

6.4.1. Repatriate transition strategies

Adler (1997) identifies three types of repatriates based on the transition strategies or coping modes they typically utilise to fit back into their formerly familiar home country and parent company: re-socialised repatriates, alienated repatriates, and proactive repatriates. Adler emphasises that the behaviours associated with each of these transition strategies vary distinctly. Herewith, a discussion on each of the three types of expatriates as described by Adler.

6.4.1.1. Re-socialised repatriates

Re-socialised repatriates typically do not recognise or utilise the skills and experience they had gained while on international assignment. These repatriates try to fit back into the domestic corporate structure in the parent company as quickly as possible. They tend to act as if they have not been away on an international assignment (Adler, 1997).

According to Black et al (1999), the re-socialisation transition strategy is most commonly utilised among corporate expatriates who work for organisations that lack a global orientation. Companies in the multi-domestic phase of globalisation are particularly prone towards negating the skills and experience gained by expatriates on their return to the parent companies.

Bender and Fish (2002) also warn against repatriates making use of the re-socialisation approach. Re-socialised repatriates deny themselves and the parent company the opportunity to grow and learn from the expatriate's experience - both from a multicultural and a global competitiveness point of view - by not utilising and transferring the knowledge and experience they had gained during their international assignments.



6.4.1.2. Alienated repatriates

While employed on their international assignments, alienated expatriates tend to "go native" (Trompenaars & Hampton-Turner, 2004: 328; Marx 1999: 15). They integrate themselves into the lifestyle and values of the foreign culture in the host country. On their return to the home country, the alienated repatriates continue to hang onto the foreign culture. They view the foreign culture as better than their own culture, and refuse to accept the home culture. In the process, the alienated expatriates often experience personal and social isolation from others in their home environment. As a result of their belief that they cannot fit back into the home environment or use the knowledge and skills they have gained while on assignment, alienated repatriates often feel professionally unproductive and personally unsatisfied (Adler, 1997).

Stahl et al (2002) indicate that alienation is often more clearly observable among returnees who have been on a number of international assignments, compared to those who have had a single assignment. They also found that the spouses of returning expatriates often tend to be even more prone towards alienation than the repatriates themselves.

Adler (1997) is not in favour of returning expatriates making use of the alienation approach of transition, as alienated individuals tend to contribute little to the parent company from their international experience. Superiors and colleagues in the parent company also generally recognise the alienated returnees' reduced productivity. As a result, these returnees are typically evaluated as being ineffective, and tend to leave the employment of the company a few months after their repatriation – often to take on an assignment with another company in the same host country.



6.4.1.3. Proactive repatriates

Proactive returnees show an acceptance towards both their own culture and the culture in the foreign country. Their preferred approach is to rather incorporate dimensions of both cultures in establishing a new paradigm towards work and life in general. Proactive repatriates recognise and apply the knowledge and skills they have acquired while on assignment to actively make a positive contribution within the work environment and to adjust their perspective towards life. They also tend to have a more positive perspective towards their own effectiveness and satisfaction in their new positions, compared to repatriates making use of the re-socialisation and alienation transition approaches (Adler, 1997).

Black et al (1999) indicate that proactive repatriates have been able to develop the skill of objectively evaluating the environments in both the host country and their home country. They are able and willing to describe situations, as opposed to simply comparing them. They are also able to identify similarities and differences between the two cultures, without needing to classify one as good and the other as bad. Proactive returnees therefore are able to create new, synergistic ways of perceiving and working within the parent company, based on both their home country experience and their experience in the foreign country.

Adler (1997) emphasises the benefits of repatriates utilising the proactive approach in integrating into the parent company work environment. By making use of this more synergistic approach in integrating the positive aspects of both cultures, the returnees are able to work more effectively with their colleagues and clients, to make decisions based on a wider range of alternatives, and to act as leaders in coming up with innovative ideas and solutions to complex problems in their work environment. However, both Trompenaars et al (2004) and Antal (2001) caution that the extent to which the proactive repatriate's potential is utilised, is strongly dependent on the organisation's willingness to actively make the most of the returnees' potential contributions, as opposed to simply going through the motions to fit them back into the organisational hierarchy.



6.4.2. Typical company responses towards repatriation

In the previous discussions, the focus fell primarily on the significant challenges faced by returning expatriates and their families on their return to the home country and organisation on completion of the international assignments. According to Jassawalla et al (2004), these challenges often leave the repatriates and their families with the feeling that the company does not care about the success they were able to achieve while on assignment, or about their well-being in re-integrating into the home environment.

Unfortunately, most executives seem to have little sympathy for repatriation problems. The executive perceives the expatriate to be coming home: “*So what is the problem with coming home?*” (Frandsberg & Kjellman, 2005). This perception of the executive is directly in conflict with the needs of the returning expatriates, as was discussed in the previous paragraphs. Black and Gregersen (2003) also report that human resource professionals may be unaware of the challenges facing repatriated managers. They therefore often get overly involved in the administrative details of the returning expatriates’ repatriation, instead of identifying strategic opportunities where the expatriates can apply their acquired international skills and experience in growing the company’s knowledge of the global business environment.

A study conducted by Stanoch (2006) found that approximately a third of the expatriates included in the study were still acting in temporary positions three months after returning from their assignments. Approximately 75 percent of the respondents were of the opinion that the permanent positions they were appointed into on their return to the parent company constituted a demotion compared to the positions they filled while on assignment, and 61 percent expressed concern that they were not able to utilise the experience they had gained while on assignment. Stanoch (2006) therefore expressed no surprise towards the finding that 40 percent of the returning expatriates in the survey left their companies within a year after their repatriation.



Stanoch (2006) identifies one of the companies included in the survey where all the expatriates sent on international assignments over a period of two years, left the company within a year after their repatriation - 25 people in total: *“The Company might just as well have written a check for \$50 million and tossed it to the winds!”*

In defence of the international companies, Jassawalla et al (2004) assert that it is very difficult for multi-national organisations to guarantee returnees a right job when they return: *“Frankly speaking, returnees and researchers cannot blame the multi-national corporations, as the changes in a company's structure, business practice, and market trends and needs are hardly avoidable while the expatriate is overseas. Therefore, even though the company promised a particular job for returnees, it is very ideal but still difficult in practice”*.

Frandsberg and Kjellman (2005) emphasise the importance of companies having a structured repatriation programme in place to ensure the successful integration of their returning expatriates, and to overcome the significant obstacles faced by both the company and the individual during the reintegration process. They recommend that the repatriation process should not be viewed as a single event. Instead, it should be viewed as a full cycle of steps that starts during the initial planning phases even before the expatriate is sent on the international assignment in the first place. They also recommend that the repatriation process should be viewed holistically as an integral part of the total internal career cycle that incorporates the three phases of selection and preparation, the time spent while on the assignment, and the final reintegration of the returning expatriate back in the home environment.



6.5. Conclusion

In Chapter 6 a detailed discussion was conducted on the various phases of the repatriation process as a last step in the expatriate's international career cycle. Attention was given to the impact of the repatriation process on the returning expatriate and his family. From the discussion it became evident that multi-national companies need to be careful in implementing the appropriate management process and interventions to ensure the successful re-integration of the returnee and his family into the parent company, as well as into the general environment in the home country. A final comment made in this regard comes from Black et al (1999): *“the bottom-line is that inattention to the difficulties of repatriation hurts employees' performance and corporate performance. By contrast, small and often relatively inexpensive steps can lead to significant returns on investment and enhanced competitive position in the global market place”*.

The discussions in Chapter 6 provide the basis for Hypotheses 1b and 1d established in this study (as can be seen in Chapter 8), which state that the expatriate's emotional health (sense of meaning and hardiness) decreases from six months into the assignment to after completion of assignment.

In Chapters 4, 5 and 6 the focus was placed on the three phases of the expatriate international career cycle. In Chapter 4, the selection and preparation phase prior to the expatriate's departure on the international assignment was discussed. The complexities and difficulties experienced by the expatriates and their families during their completion of the international assignment were discussed in Chapter 5. A study was also conducted on the sometimes most difficult but often forgotten part of the international assignment, namely the expatriate's repatriation and reintegration back in the home country and company on completion of the international assignment. Specific attention was given in all three chapters to the impact of the work environment on the expatriate during the various phases of the international assignment.



Following on Chapter 6, a detailed investigation is conducted in Chapter 7 on the emotional well-being processes experienced by the expatriate during the various phases of his international career cycle. In this regard, an effective way to measure and to manage the emotional well-being of the individual during the expatriation process is to make use of an organised and structured approach in providing the required support during critical phases of the expatriation process. In order to make this process more scientific, the expatriate's emotional well-being can be measured and compared to other expatriates in similar conditions to ensure continued emotional well-being. In Chapter 7, the approaches and instruments to be used during the measurement of the individual in his adjustment to the foreign environment are examined.

The salutogenic model of health as developed by Dr Aaron Antonovsky will be utilised as scientific basis within which the emotional health of the expatriate during specific periods of adjustment in the international career cycle will be measured.



Chapter 7

Expatriate emotional adjustment

7.1. Introduction

Research Objective 5 set in this study is to investigate the main personality and organisational climate predictors of the expatriate's levels of emotional health while on an international assignment in a foreign country. In order to achieve this objective, Chapter 7 investigates the applicable academic research that forms the underlying foundation for expatriate psychological health as investigated in this study. Attention is given to the individual's adjustment to the expatriate environment within the framework of the salutogenic model of psychological health as established by Dr Aaron Antonovsky.

Expatriates progress through three predictable phases in relocating from a position in the parent company to an international assignment in a foreign country and back home again. The three phases in the expatriate's international transfer cycle are pre-departure selection and preparation, the actual period abroad, and repatriation or transfer (Brotchi & Engvig, 2006; Frandberg & Kjellman, 2005). During each of the adjustment phases in the expatriate career cycle, the individual is required to deal with substantial levels of stress and emotional turmoil. In the process, a major task of the individual is to remain emotionally healthy despite being faced with a multitude of external pressures and demands exerted on him from the external environment in the foreign country - both at a professional and a personal level.

In order to obtain an appreciation of the emotional pressures experienced by the expatriate, it is important to obtain a clear understanding of the concept "emotional health". Chapter 7 focuses specifically on the concepts of sense of coherence and hardiness as "internal or personal protective factors" utilised by the expatriate in remaining emotionally healthy and adjusting to the constantly changing expatriate environment. Both these factors form an integral part of the salutogenic model of psychological health as developed by Dr Aaron Antonovsky (1993) that will be used to discuss the expatriate's health.



Also in Chapter 7, the influence of the expatriate's own personality traits on his ability to remain healthy despite being placed under very high levels of emotional stress will be discussed according to the global five personality factors model as developed by Cattell (Cattell et al, 1988) in his research on the Sixteen Personality Factor Questionnaire (16PF).

7.2. Emotional health in an expatriate context

Kaplan and Sadock (1991: 546) indicate that, where an individual is exposed to rapid cultural changes it could lead to an increase in the person's vulnerability to life strain. Kaplan and Sadock (1991: 224) refer to the Diagnostic Manual of Mental Disorders (DSM-III-R) which provides a six point "Severity of Psychosocial Stressors Scale" for categorising the psychosocial stressors that significantly contribute to the development of psychological and physical illness.

The DSM-III-R defines stressors as "*predominantly acute events (with a duration of less than six months), or predominantly enduring circumstances (with a duration greater than six months)*". A score of six represents catastrophic stress (for example multiple family deaths), and a score of one represents no apparent stress. On the six-point scale, expatriation and reallocating to a foreign country or culture is allocated a rating of four, which represents severe stress. As illustrated in Table 7.1 below, the impact of expatriation on the individual's emotional wellbeing is rated similar to the stress caused by divorce, poverty, and chronic life threatening illness in parents.

Table 7.1.: Severity of psychosocial stressors scale (Kaplan & Sadock, 1991)

Examples of Stressors			
Rank	Category	Acute events	Enduring events
1	None	No acute events of relevance	No enduring circumstances of relevance
2	Mild	Completion of studies; child left home; break-up with partner	Overcrowded living quarters; job dissatisfaction; family arguments
3	Moderate	Marriage; job loss; marital separation; retirement, etc.	Marital discord; serious financial problems; trouble with boss, etc.
4	Severe	Divorce; arrest; birth of first child; unwanted pregnancy	Life threatening illness of parent; unemployment; poverty; move to new country (expatriation)
5	Extreme	Death of spouse/parent; serious physical illness; victim of rape	Serious chronic illness in self or child; ongoing physical or sexual abuse
6	Catastrophic	Death of child; suicide of spouse; devastating natural disaster	Captivity as hostage; concentration camp experience

It becomes evident from the categorisation of stressors provided by the DSM-III-R that the individual expatriate is exposed to severe levels of psychosocial stress during his relocation into the foreign country, which could potentially lead to the person experiencing symptoms of emotional fatigue. In extreme cases, this cultural transition could lead to severe levels of distress to the individual. Kaplan and Sadock (1991) also refer to this problem as culture shock, which occurs when an individual is suddenly forced into an alien culture. According to Kaplan and Sadock (1991: 130), individuals respond to culture change either by actively moving and integrating themselves into the culture, or by remaining stagnant while the culture changes around them. When the change takes place too quickly and overwhelmingly, the adaptive mechanisms of individuals and of their social support structures may be overwhelmed.



Culture shock is typically characterised by feelings of anxiety or depression, a sense of isolation, and depersonalisation. Anderzen and Arnetz (1999) found that six out of ten international assignments involve sufficiently high levels of stress and strain on the expatriate to cause either an early return or at least a significant drop in effectiveness and professional performance. This finding is confirmed by Beaverstock (2000), who indicates that the proportion of expatriates who fail in their international assignments and return prematurely ranges from 10 percent to 45 percent, with the higher rates associated with assignments in underdeveloped or developing countries.

Expatriates themselves also have an active role to play in their adjustment to the demands placed on them while on international assignment. The core purpose why companies make use of expatriates is to achieve certain very specific work-related objectives. In order to achieve these objectives, it is imperative for the person to possess and utilise the appropriate coping mechanisms and personality traits that will enable him to remain productive and emotionally healthy during the various phases of the international assignment.

Kaplan and Sadock (1991: 224) assert that individuals who present a “high level of functioning” before being exposed to excessive levels of strain as a result of severe psychosocial stressors (for example expatriation), generally have a better prognosis for recovery than those who have a “low level of functioning”. Kaplan and Sadock (1999) conceptualise “functioning” as a composite of three major areas: social relations, occupational functioning, and psychological or emotional health. They indicate that people who have high levels of psychological or emotional health (which includes possessing mature defence mechanisms such as flexibility, having a full and satisfying life, and possessing a “capacity for sublimation”), typically demonstrate a high level of resilience to deal and adjust to these life changes.



7.3. Emotional health defined

According to Kent (2005), “*health is not a clearly defined construct, but rather one that is difficult to comprehend and to describe*”. Researchers (Kent, 2005; Pott, 1998; Kossuth, 1998; Antonovsky, 1991) seem to agree that health must be viewed as a multi-dimensional concept. Included in the definition of health is not only physical well-being (for example feeling healthy, no symptoms of illnesses or disease) and psychological well-being (for example joyfulness, happiness, and feeling good about oneself). The concept also incorporates personal accomplishment, self-actualisation, and a sense of purpose.

According to Pott (1998), health “*depends on the existence, on the perception, and on the means of dealing with stress and strain, on risks and hazards in the social and ecological environment, on the existence, on the perception, on the tapping and on the use of resources*”. From the above mentioned discussions it becomes evident that the phenomenon of health is complex and needs to be investigated in sufficient depth to avoid any inappropriate generalisations or restrictions on the concept.

At first glance, the concepts of “health” and its perceived opposite “disease” appear to be clearly defined (Kent, 2005). Simplistically, “health” can be characterised by well-being and the nonexistence of symptoms and complaints. Alternatively, “disease” is directly related to the individual complaining and experiencing pain. However, Kent also asserts that the concepts of health and disease become significantly more complex if viewed from a personal and a social perspective.



On the one hand, “health” can indicate towards well-being and happiness. It can also be viewed as merely the absence of symptoms. A third point of view might be that health incorporates the individual’s ability to deal with stress and tension. Kent (2005) indicates that these subjective perceptions towards health develop as part of each individual’s development and socialisation within the context of a specific personal and social environment. The person’s perspective towards physical complaints is influenced by his assessment of the way in which things are done within their specific culture. This assessment can be influenced by the severity of the symptoms. However, the individual’s perception towards the complaints from a cultural perspective has a substantial impact on his response and health-related behaviour towards the specific condition.

The World Health Organisation (WHO) (1948) defines health as “*a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity*”. This definition provided by the WHO provides an ideal standard of health that represents a condition of complete psychological and physical well-being. However, such a “perfect” definition may also be viewed as being unrealistic, taking into account the fact that such absolute states of health are not practically achievable (Pott, 1998).

The traditional biomedical model of health/disease was developed during the beginning of the 19th century. According to this model, the human body can be compared to a machine (Pott, 1998). The way in which the human body functions and is exposed to functional disorders can best be understood when a precise analysis is conducted on physiological systems, structures, and processes at work in the body. Therefore, symptoms of disease (incorporating both physical complaints and psychological problems) need to be investigated by focusing on the body’s “mechanical” organic deficiencies. The extent to which a person could be categorised as ill or not is dependent on whether anatomical or physiological changes can be identified. The involvement of a logically thinking individual in this process is to a large extent excluded. The person is viewed as a passive and reactive object that has no psychological or social influence over any of his physiological processes (Pott, 1998).



A significant amount of criticism developed towards the biomedical model of disease. The major concern towards the model was that it was too simplistic, and that it degraded the human individual to a senseless victim of his circumstances. Engel (as cited in Pott, 1998) expanded on the biomedical model. According to Engel, both somatic and psychosocial factors should be incorporated to provide a better understanding of the underlying foundations and the development of disease. He referred to this new approach as the biopsychosocial model of disease. According to Engel, research indicates that psychological and social factors play a significant role in the appearance and development of disease. These factors have an impact on the way in which disease is diagnosed and treated. They also influence the way in which the individual perceives symptoms, experiences pain, and even the decision to undertake medical treatment and to adhere to medical procedures as prescribed by the doctor.

Based on Engel's research (as cited in Pott, 1998), the statistical norm of health developed which states that health is determined by the number of times a particular characteristic occurs in the individual organism. The extent to which a person is considered healthy is therefore determined by the degree to which the characteristic is prevalent in the majority of people. Alternatively, disease is indicated by variations from these average values. Consequently, in order for an individual to be classified as being either healthy or ill, a reference group needs to be available that specifies factors such as age and gender.

7.4. Salutogenesis as an alternative approach towards emotional health

In reaction to the relatively rigid and inflexible paradigm utilised by the traditional statistical norm approach towards health, a number of influential psychological concepts were developed which attempted to explain how the development and change in health is affected by individual characteristics (Pott, 1998). A prominent approach that was developed as an alternative paradigm to the traditional pathogenic approach towards health was the so-called salutogenic orientation towards health (Kent, 2005; Pott, 1998).



According to Kossuth (1998: 90), the salutogenic paradigm can be viewed as a combination of concepts that have developed independently. More specifically, the underlying theories and principles of the salutogenic approach towards health were first described by Dr Aaron Antonovsky in 1979 (Antonovsky, 1979). Antonovsky questioned the fundamental hypotheses of western medical research and practice, and compared them with the fundamentals of his salutogenic paradigm. However, he also viewed salutogenesis and the pathogenic approach as being complementary in their purpose and objectives.

In his development of the salutogenic paradigm, Antonovsky (1991) conducted research on the impact of the adverse conditions in concentration camps on individuals. His research was specifically focused on women who survived concentration camps during the Second World War. Antonovsky found that the group of women who survived the concentration camps displayed considerably more symptoms of ill health compared to the women in the control group. However, nearly 30 percent of the concentration camp survivors indicated that they still viewed themselves as maintaining relatively high levels of emotional health, despite the intensely traumatic experiences they had been exposed to (Antonovsky, 1991). Antonovsky wondered how these women were able to still maintain such high levels of health, notwithstanding the extreme pressure that was placed on them.

Based on his research on these former concentration camp survivors, Antonovsky used the following three questions as the foundation for the Salutogenic theory:

- *“Why do people stay healthy despite being exposed to so many detrimental influences?”*
 - *How do they manage to recover from illnesses?*
 - *What is special about people who do not get ill despite the most extreme strain?”*
- (Antonovsky, 1990).



Antonovsky used these three questions as the central point of departure for the research he conducted on health. Within the framework of this research, these questions are also viewed as being of significant importance in the expatriate's ability and willingness to cope with the pressures exerted on him during the various phases of the international career cycle. The salutogenic model is based on the following assumptions (Antonovsky, 1990):

- The emphasis is placed on the origins of health or well-being;
- The primary concern is with the maintenance and enhancement of well-being;
- The assumptions that stressors are inherently bad are rejected in favour of the possibility that stressors may have salutary or beneficial consequences.

Antonovsky criticised the common healthy/sick approach upon which the traditional pathogenic model of health is based. Within the framework of the pathogenic model, the conditions of health and disease are usually assumed to be mutually exclusive. Accordingly, an individual is either healthy or ill. Only one of the two conditions can be present at any given moment. Whether the person is classified as healthy or ill is determined by a health provider's diagnosis of a particular disease, or alternatively by the patient self (Antonovsky, 1990).

In his criticism towards the traditional western pathogenic approach, Antonovsky compared this approach with a scale he called the "*health ease/dis-ease continuum*". On this continuum, he identified two poles, namely: ease (health) and dis-ease (illness). It is not possible for a living organism to achieve either of the extreme poles on the continuum, namely perfect health or complete disease. Every individual will have unhealthy parts, even though he may perceive himself or herself as being healthy. Alternatively, certain components of the person must be healthy if he is still alive: "*We are all terminal cases. But as long as there is a breath of life in us, we are all in some measure healthy*" (Antonovsky, 1990). According to Antonovsky, the emphasis should not fall on whether a person is healthy or ill, but rather on where he is placed on the continuum between perfect health ease and complete dis-ease.



Antonovsky (1990) asserts that a mechanistic model is used by the pathogenic medical approach to define, diagnose, and treat disease. Deficiencies and illnesses need to be diagnosed and treated by means of focused medical treatment. Specific pathological processes form the framework within which disease is treated. Each illness can be clearly defined in terms of identifiable pathogenic conditions and agents, as well as stressors and risk factors. During the treatment of the illness, the emphasis falls on protecting the individual against these conditions and agents.

Antonovsky (1990) proposed the salutogenic approach as an alternative to the traditional pathogenic approach towards health. The objective of the salutogenic approach is to build up the resistance of the organism against threats by strengthening the available resources, as opposed to merely defending the organism against pathogenic agents. This resource-oriented thinking requires that the person be viewed from a holistic system-perspective that incorporates all of his life experience, as well as the external environment within which the person is required to function (Antonovsky, 1990).

Antonovsky (1991) makes use of a metaphor to compare the pathogenic perspective towards health with the salutogenic perspective: *“The pathogenic approach is aimed at rescuing people at great expense from a raging river, without taking into consideration how they got in there and why they are not better swimmers. In contrast, viewed from the perspective of health education, people sometimes willingly jump into the river, while at the same time they refuse to learn to swim”*.

Antonovsky (1990) expands on the above mentioned metaphor to describe salutogenesis: *“... my fundamental philosophical assumption is that the river is the stream of life. None walks the shore safely. Moreover, it is clear to me that much of the river is polluted, literally and figuratively. There are forks in the river that lead to gentle streams or to dangerous rapids and whirlpools. My work has been devoted to confronting the question: ‘Wherever one is in the stream – whose nature is determined by historical, social-cultural, and physical environmental conditions – what shapes one’s ability to swim well?’*”.



The term “*salutogenesis*” is a Latin word that incorporates “*salus*” (Latin for “invincibility”, “well-being”, or “happiness”), and “*genese*” (Greek for “genesis” or “origin”). The term stands in contrast to “*pathogenesis*” (*pathos*, Latin for “pain” or “suffering”; and *genese*, Greek for “genesis”, “origin”) (Antonovsky, 1991).

Based on the conceptual framework of the salutogenic model, a number of influential psychological concepts were developed to explain how the development and change in health is influenced by individual characteristics. Pott (1998: 49) refers to these characteristics as “*internal or personal protective factors*”. Internal protective factors are referred to as “*dispositional, though changeable personal characteristics, as well as cognitive or behavioural styles that are situational and instrumental in the individual’s ability to cope with life’s stressors*” (Pott, 1998: 150). According to Kossuth (1998: 93), two of the most well-known approaches developed in defining these personal protective factors are the concept of sense of coherence developed by Antonovsky, and the concept of hardiness developed by Kobasa.

Antonovsky (as cited in Pott, 1998) himself makes a strong case for using his own sense of coherence factor and Kobasa’s concept of hardiness as important constructs in the salutogenic orientation: “*Instead of asking about pathogens and failures in coping which lead to disease, what is common to these approaches (Sense of Coherence and Hardiness) is their focus on explanations of successful resolution of stressors and maintenance of return to health. The focus on successful coping is the first and major criterion for selection of the constructs or salutogenic strengths*”.

Other dimensions also considered by Antonovsky as suitable to be considered for inclusion as part of the salutogenic model would be Bandura’s self-efficacy and Rotter’s locus of control (Pott, 1998: 55).



Taking into account the above mentioned observations, it was viewed appropriate to include the sense of coherence and hardiness as the main salutogenic concepts in this research. From an expatriate adjustment perspective, it is viewed of critical importance to conduct a careful investigation into these two concepts, as they play a very important role in their capacity as “internal or personal protective factors” in the individual’s ability to cope with the pressures associated with expatriation. A discussion on each of these two concepts will now be conducted.

7.5. Sense of coherence

A key aspect included by Antonovsky (1991) in his salutogenic model is a concept which he refers to as Sense of Coherence. Antonovsky asserts that an individual’s state of health/disease and the extent to which the person is able to cope with stress is to a large extent determined by one specific individual psychological factor, namely his general perspective towards life. He refers to this basic outlook towards life as the person’s Sense of Coherence.

Antonovsky (1991) views sense of coherence as being critical to explain the human ability to maintain and promote health. According to Antonovsky, the term “Coherence” refers to stability, balance, and harmony. The higher the individual’s sense of coherence, the more effective he will be to obtain and maintain health. Antonovsky (1991) defines the sense of coherence as: *“The sense of coherence is a global orientation that expresses the extent to which one has a pervasive, enduring though dynamic feeling of confidence that (1) the stimuli deriving from one’s internal and external environments in the course of living are structured, predictable, and explicable; (2) the resources are available to one to meet the demands posed by these stimuli; and (3) these demands are challenges worthy of investment and engagement”*.



According to Antonovsky (1991), the descriptive term “dynamic” describes this orientation towards life as it is constantly faced and influenced by new life experiences. On the other hand, the nature of life experiences is also influenced by the level of sense of coherence. Consequently, the basic orientation towards life reaches a level of consistent stability and endurance, and is supported by life experiences. External circumstances and social roles do not have any significant impact on the strength of the sense of coherence. For this reason, Antonovsky refers to this outlook on life as a “*dispositional orientation*”, which he describes as a relatively constant personal attribute. However, he also cautions that this concept does not indicate towards any specific personality trait.

Antonovsky (Antonovsky & Sagy, 2001; Antonovsky, 1991) continually debated the issue of the stage in life when one develops one’s sense of coherence, at which stage it stabilises, and whether or not the sense of coherence can change during the course of one’s life. He contended that the sense of coherence develops during a person’s childhood. Experiences gathered during the process of growing up directly influence its development. Significant changes and adjustments can still take place during adolescence. Various areas of the adolescent’s life have not yet been fully established, and a multitude of options and opportunities are available. Antonovsky indicates that the sense of coherence reaches maturity by the age of 30. During the adult phase it remains relatively stable, and will only experience small and temporal changes.

Antonovsky (1993) highlights the following characteristics of the sense of coherence:

- Various systems of the human organism are directly influenced by the sense of coherence such as the immune system, the central nervous system, and the hormone system. Thinking processes (also referred to as cognitions) utilised to evaluate whether a situation is dangerous, safe or welcome are also directly impacted. Consequently, a strong relationship exists between the sense of coherence and the production of complex reactions in the brain;



- The sense of coherence stimulates already existing resources. The successful activation of these resources results in a reduction in the levels of stress experienced by the individual, and therefore has an indirect impact on the physiological systems involved in the management of tension. According to Antonovsky, short-term physiological stress actions (tension) do not need to be detrimental, provided sufficient opportunity is allowed for a subsequent recovery phase. Imbalances and subsequent damage only arise where these self-regulating processes are disrupted;
- Individuals with a high sense of coherence should be better capable to select positive behaviours that specifically advance health (for example regular physical exercise, timely medical examinations, etcetera), and avoid acting in negative ways that could have a detrimental impact on their health. The sense of coherence therefore indirectly influences the state of health by affecting health-promoting behaviour.

7.5.1. Dimensions of sense of coherence

Antonovsky (1993) asserts that the sense of coherence pre-empts the individual's expectation that things will work out well. A person with a high sense of coherence is able to react flexibly to challenges and difficulties, and can mobilise the appropriate resources for specific situations. Conversely, an individual with a poorly developed sense of coherence would be rigid and inflexible in his reaction to demands, as he perceives himself as having fewer coping resources.

Antonovsky (1993) emphasises that the sense of coherence is not a specific coping style, but should rather be viewed as a more central function utilised to guide and regulate the organism. This basic disposition of perceiving life as meaningful consists of three components: sense of comprehensibility, sense of manageability, and sense of meaningfulness. A discussion on each of these components follows:



7.5.1.1. Sense of comprehensibility

Sense of comprehensibility refers to the individual's "*expectation or ability to process both familiar and unfamiliar stimuli as ordered, consistent, structured information and not to be confronted with stimuli that are chaotic, random, accidental and incomprehensible*" (Antonovsky, 1993). Antonovsky defines the term "comprehensibility" as a so-called "cognitive processing pattern". A person who scores high on comprehensibility will expect the stimuli that he will encounter in the future to be predictable and explicable. The person believes that things will work out well, that events can be coped with, and challenges will be met.

7.5.1.2. Sense of manageability

Sense of manageability represents the individual's belief that solutions exist to problems and difficulties. Antonovsky also refers to this conviction as "instrumental confidence" and defines it as "*...the extent to which one perceives that the resources at one's disposal are adequate to meet the demands posed by the stimuli that bombard one*". The degree to which the person experiences a high sense of manageability is not necessarily dependent on his own resources and competencies. It also includes the conviction that guidance and support in dealing with problems will be available from a higher power or other people. Antonovsky considers the sense of manageability as a "*cognitive-emotional processing pattern*" (Antonovsky, 1993).

7.5.1.3. Sense of meaningfulness

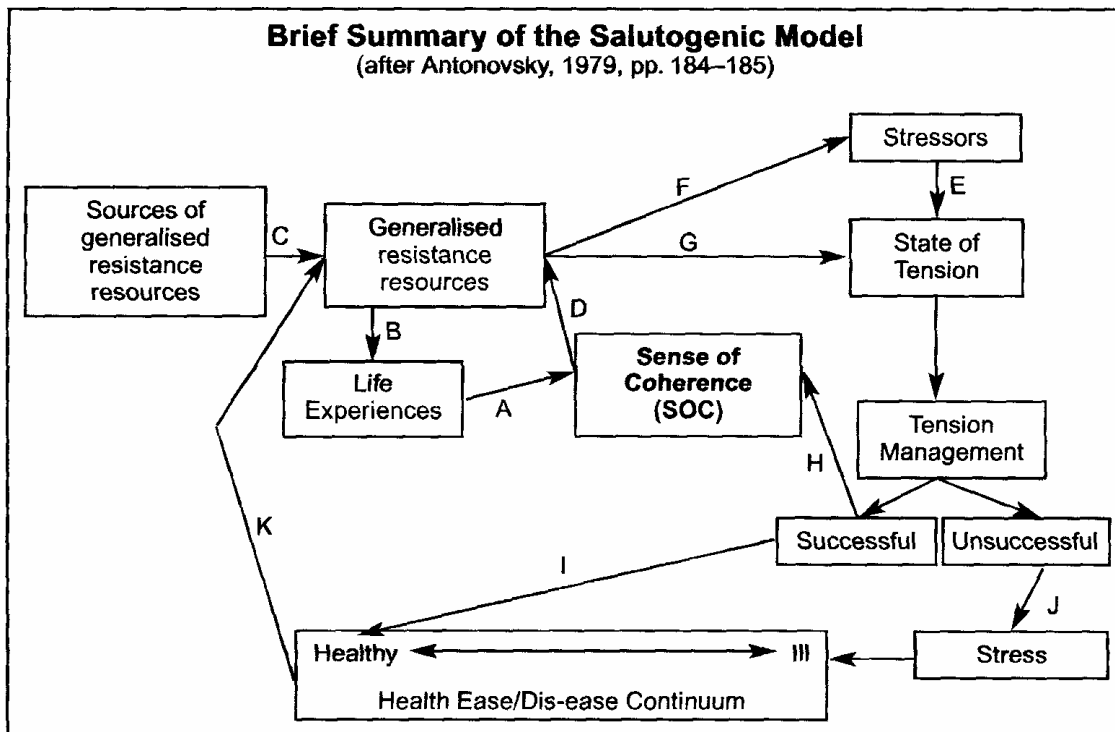
The term sense of meaningfulness represents "*...the extent to which one feels that life makes sense emotionally, that at least some of the problems and demands posed by living are worth investing energy in, are worthy of commitment and engagement, are challenges that are 'welcome' rather than burdens that one would much rather do without*".

Antonovsky considers the sense of meaningfulness to be the most important of the three factors included in the sense of coherence factor. If the person does not experience meaningfulness and does not have any positive expectations towards life, his sense of coherence score will be low, irrespective how pronounced the other two components are. A person who lacks meaningfulness will also tend to be anxious towards life, and will view any additional challenges as a mere continuation of the already experienced suffering (Antonovsky, 1993).

7.5.2. Application of sense of coherence

A graphical layout of the principles included in Antonovsky's Salutogenic Model of Health is provided in Figure 7.1 below (Pott, 1998; Antonovsky, 1979). The principles indicated in the model will now be discussed.

Figure 7.1.: Principles of the salutogenic model of health



(Pott, 1998: 33)



According to Antonovsky (1979), the individual's experiences in life create and form his sense of coherence (Pointer A). In order to achieve a high sense of coherence, the life experiences need to be as consistent as possible and should not lead to the person experiencing feelings of overload or underload. The individual must also be able to effectively influence these life experiences. Antonovsky indicates that such positive life experiences are activated by "generalised resistance resources".

Examples of these resistance resources would be physiological features, intellect, social support, coping strategies, financial power, and societal factors (Pointer B). The development of the resistance resources is directly influenced by the cultural and historical context, the environment and behavioural framework within which the person is brought up, as well as the person's social roles. Finally, the individual's own attitudes, as well as other random events can also influence the development and presence of specific resistance resources.

The strength of the sense of coherence determines the degree to which the pre-existing generalised resistance resources can be activated (Pointer D). In a negative scenario, the interaction among the three factors creates a repetition that can potentially develop into a vicious circle. The development of the sense of coherence will be negatively impacted where resistance resources are restricted. Conversely, a weak sense of coherence hinders the optimal development and activation of the available resistance resources.

Increased states of tension and emotional strain develop where the individual is faced with stressors for which he does not have an automatic response (Pointer E). The mobilised generalised resistance resources influence the extent to which the stressors are effectively managed (Pointer F), as well as the intensity of tension experienced by the individual (Pointer G). This process also repeats itself. The success achieved by the individual to reduce the levels of experienced tension leads to a strengthening of his sense of coherence (Pointer H).



The successful tension reduction ensures the individual's ability to maintain or re-establish his experienced state of health (also referred to by Antonovsky as the position on the ease/dis-ease continuum) (Pointer I). A healthy position on the ease/dis-ease continuum also promotes the development of new resistance resources (Pointer K).

On the other hand, ineffective tension management results in an elevated state of tension (Pointer J). This state of tension experienced by the individual interacts with existing pathogenic influences (diseases) and individual physical or emotional weaknesses, and therefore has a detrimental impact on the individual's position on the ease/disease continuum (Antonovsky, 1979).

7.5.3. Relationship between sense of coherence and expatriation

Antonovsky (Antonovsky & Sagy, 2001; Antonovsky, 1991) considered the possibility that health can be negatively influenced by external elements such as natural disasters, political unrest, hunger, or unstable social conditions. His hypothesis in this regard was that the individual's state of health under such unfavourable circumstances will be dependent on the extent to which his cognitive and affective-motivational perspective towards life is developed. In turn, this perspective will influence the degree to which the person is able to activate the available resources in order to maintain his health and well-being.

However, Antonovsky (1993) also indicated that a radical change in one's structural external situation can lead to a significant modification in one's sense of coherence. He specifically highlights emigration to a foreign country (which includes expatriation) as an example of a radical change in the individual's cultural or social living environment that can result in a considerable variation in the sense of coherence. In line with the findings of Kaplan and Sadock (1991), other examples mentioned by Antonovsky that could have an impact on sense of coherence would be relocating to a new neighbourhood, getting married, or being unemployed for an extended period of time (Antonovsky as cited in Pott, 1998: 28).



Also of interest in this regard would be Antonovsky's utilisation of the severe difficulties experienced by the concentration camp survivors as objects for his research on his salutogenic model and sense of coherence. Based on his research on these concentration camp survivors, Antonovsky (Antonovsky & Sagy, 2001; Pott, 1998) came to the conclusion that adverse living conditions can obstruct the optimal development of the sense of coherence. According to Antonovsky, children growing up in unfavourable life situations do not have the same opportunity to develop their sense of coherence compared to children who are exposed to a supportive and conducive social environment.

Consistent with Antonovsky's utilisation of concentration camp experiences as the most severely unfavourable life circumstances in establishing his salutogenic model, Kaplan and Sadock (1991) also classify captivity as a hostage or a concentration camp experience as a level six stressor (labelled as Catastrophic) on the "Severity of Psychosocial Stressors Scale".

From an expatriate perspective, Antonovsky's assertions on the effectiveness of sense of coherence in facilitating the individual's ability to cope with highly stressful situations are confirmed by research conducted by Anderzen and Arnetz (1999) on relocating employees from Sweden to foreign countries over a period of two years. In their study, Anderzen and Arnetz (1999) found that a strong sense of coherence in life decreased the stress response and facilitated the adaptation process of the expatriates. Sense of coherence was found to be negatively correlated to the level of psycho-physiological stress experienced by the expatriates, as well as to negative mental adjustment during the study. According to the study, individuals who have a high level of sense of meaning have a stronger ability to control and minimise the impact of the external environment on specific stress-related chemical reactions taking place in the human body during periods of extensive travel and pressure.



Conversely, Anderzen and Arnetz (1999) also found that a low sense of coherence increased the risk of maladjustment by the expatriate to the foreign environment by four to five times, and that individuals who perceive themselves as having low sense of coherence and control over their environment, are more likely to experience psycho-physiological stress and symptoms of depression.

The above mentioned example confirms the observations made earlier in this study, which indicated that the expatriate is exposed to severe levels of stress during his relocation into the foreign country. Taking into account Antonovsky's views on the impact of sense of coherence on the individual's ability to cope with stress, the inference can therefore be made that the individual expatriate who has a high sense of coherence should be able to cope better with the pressures associated with the various phases of the international career cycle, compared to the individual with a weak sense of coherence, who may tend to become overwhelmed and paralysed by the pressures associated with adjusting to the new and constantly changing environment in the foreign country.

7.6. Hardiness

The 'hardiness' construct was developed by Kobasa during the late 1970's (Pott, 1998). Kobasa was also interested in the impact that individual characteristics have on the development and variation of health and disease (Bissonnette, 1998; Gironi et al, 1997). Kobasa initially utilised the hardiness concept to investigate the interaction between health and stress from a medical perspective. Her findings revealed that individuals who are exposed to high levels of stress but remained healthy had a different personality structure compared to individuals who were exposed to highly stressful situations and became ill. The core of this personality structure, referred to by Kobasa as hardiness, was subsequently defined as "*the use of ego resources necessary to appraise, interpret, and respond to health stressors*" (Bissonnette, 1998).



Kobasa (1982) conceptualises hardiness as *“a general health promoting factor which enables individuals to remain both psychologically and physically healthy despite confrontations with stressful situations or experiences”*.

Although Kobasa never made use of the term, Pott (1998) asserts that she was an active supporter of the salutogenic approach. Kobasa (1982) is of the opinion that hardiness as a personality trait has a determining effect on the contrasting ways in which people react to objectively identical stressors and stressful situations. In her research, Kobasa administered personality tests on various groups of executives who worked in stressful situations. The groups were typically divided into two fairly equal groups. The first group included executives who showed many symptoms of illness, and in the other group were included individuals who showed few of these symptoms, despite the fact that both groups had been exposed to equally stressful external circumstances.

Based on her research on these executives, Kobasa (1982) conceptualised the specific cognitive style called the “hardy personality”. According to Kobasa, the characteristics of the hardy personality reflect an individual’s ability to successfully cope in stressful situations by means of a careful and logical assessment of the particular problem in the context of his social environment and existing social support system.

Kosaka (1996) defines hardiness as *“the measure of one’s tendency to make relationships to oneself and one’s external world. It is not a mere rigidity or stress ‘endurance’, but a power to cultivate one’s way under difficult circumstance and go through stressful events. It is not like a reckless attack, but an ability to understand conditions around oneself, an ability to self-decision”*.



According to Kobasa (1982), the hardiness concept underlies the individual's ability and willingness to effectively deal with change. In this regard, Maddi and Koshaba (2006) indicate that hardy employees tend to take the lead in changing and ambiguous situations because they exhibit a key attitude towards life that activates creative and results-orientated problem solving. Employees with high levels of hardiness also tend to display higher performance, enthusiasm, self-confidence, leadership, and health.

People who exhibit pronounced levels of hardiness are interested and actively involved in all aspects of their lives (Kobasa, 1982). This ability demands of the person to have confidence in his own value, behaviours, and sound judgment. It also involves social interaction and commitment. Research conducted by Maddi and Kobasa (as cited in Harrison et al, 2002) found that hardy individuals tend to make a positive appraisal of their situation when faced with a stressful life event. The stressor therefore becomes an interesting and important stimulus on which it is possible to act. The stressor also has an inherent potential to play a role in personal growth and development. Hardy individuals have also developed the skill to use social support in order to reinforce their ability to manage situations.

Kobasa (as cited in Pott, 1998) identifies two different health influencing mechanisms for the hardiness variable. Firstly, hardiness can provide a protective shield that leads to people dealing with stress differently, and making use of effective coping mechanisms in resolving the difficulties facing them. Within this scenario, hardiness impacts on health in an indirect way. Hardiness also has an effect on the person's cognition and assessment of a stressful incident, and results in him dealing with perceived unpleasant situations in an effective and enthusiastic way. The second contributing aspect associated with Kobasa's hardiness is that the concept is viewed as actively reducing the tension experienced by the individual.



Kobasa (1982) theorises that hardiness develops in early childhood. It grows as the result of rich, diverse, and rewarding life experiences. However, in contrast to Antonovsky, Kobasa (as cited in Pott, 1998: 52) does not view hardiness as a static personality characteristic that completes its development during childhood and then remains fixed during adulthood. According to Kobasa, personality characteristics are personal styles that continuously develop during the person's interaction with the external environment. In her commentary towards the two approaches, Pott (1998) comes to the conclusion that Kobasa's hardiness model is different from Antonovsky's Sense of Coherence to the extent that it allows for individual change and growth to take place. In this sense, she views Kobasa's approach not to be as pessimistic and inflexible as that of Antonovsky.

Integral to the hardiness concept, Kobasa (1982) identifies three components or elements of hardiness that are critical in people who are able to function optimally under confusing and stressful circumstances, namely commitment, control, and challenge. According to Pott (1998: 52), these three elements are closely related and overlap with each other. They also correspond closely with the three components included in Antonovsky's sense of coherence concept. The three dimensions will now be discussed.

7.6.1. Dimensions of hardiness

7.6.1.1. Commitment

Kobasa (1982) defines Commitment as the ability to interact and to feel actively involved with others and to believe in the value and importance of oneself and one's experience. According to Maddi and Koshaba (2006), the concept of commitment leads people to sufficiently value their own worth and importance. This enables them to fully interact in the achievement of tasks and objectives, despite being faced with stressful changes. Commitment also represents a fundamental sense of one's worth, purpose, and accountability, which protects the individual against weakness while faced with difficult circumstances (Bissonnette, 1998). The person is therefore able to adjust his perceptions of adverse situations to make them meaningful and interesting.



Research by Skirka et al (2000) found that people with a high sense of commitment are more inclined to be self-reliant in identifying appropriate avenues to transform a stressful situation into an experience that is valuable and important. They also noticed that individuals who indicate higher levels of commitment are more committed to various aspects of their life including interpersonal relationships, family, and themselves.

According to Bissonette (1998), the term commitment utilised by Kobasa is conceptually similar to Antonovsky's meaningfulness (the third dimension included in the sense of coherence factor). Antonovsky (as cited in Pott, 1998) himself is slightly more vocal in his commentary, indicating that Kobasa's sense of commitment means "*exactly the same thing*" as his term meaningfulness.

7.6.1.2. Control

Control describes the individual's conviction that he is able to control or influence occurrences in his life, that his personal efforts can modify stressors in order to reduce them into a more manageable state, and that there is a direct correlation between one's actions and external events (Maddi & Koshaba, 2006). In her research, Kobasa (1982) found that the concept of control motivates individuals to identify alternative approaches that will modify the expected results of stressful changes, as opposed to becoming reactive and despondent.

Kobasa (1982) makes a distinction between external and internal control. External control refers to a position where the source of control lies outside the person. Internal control applies where the person believes the control lies within him or herself. Within this paradigm, an individual with a high level of hardiness has a strong belief that he can effectively cope and manage developments in his external environment. Such an individual takes responsibility for his own actions, and is self-determined in coming up with solutions in dealing with difficult life situations. The person with a strong sense of control believes that he can change the way things are in his life, as opposed to viewing him as a victim of his circumstances.



On the other hand, people with lower levels of control (also referred to by Kobasa as external locus of control) tend to experience an inconsistency between their perceptions of developments in their external environment, and the emotions of powerlessness they experience in their attempts to take control over the impact these developments have over their lives (Kobasa, 1982).

Seligman (as cited in Bissonnette 1998) suggests that a sense of control is cultivated early in life as infants learn that intentions are correlated with voluntary movements. Gradually, a general expectation is developed in the child that his actions have a significant impact on situational outcomes.

Antonovsky's response (as cited in Pott, 1998) to the Control dimension as developed by Kobasa is that the Internal-External Locus of Control scale differs drastically from his approach in the sense that it only provides for two alternatives: either the individual controls developments in his external environment or they do not. Antonovsky's model also makes provision for the individual to have the opportunity to place his trust in the hands of another person who possesses more control over developments in the external environment.

7.6.1.3. Challenge

The third dimension, challenge, reflects the individual's belief that change is not a threat to personal security, but an opportunity for personal development and growth (Maddi & Koshaba, 2006; Kobasa, 1982). McCranie (as cited in Harrison et al, 2002) adds to this definition, indicating that challenge is the positive anticipation of change, where change is perceived as stimulating and contributing to personal growth.

Kobasa (1982) asserts that individuals with high hardiness experience changes in their lives as a challenge rather than a threat. They view these changes as stimulating and as an opportunity for personal development. They enthusiastically search for new experiences, and display adaptability when faced with unforeseen circumstances.



Where an individual indicates a low level of challenge, the fears associated with potential mistakes present an obstacle to overcoming challenges. It therefore also has a potentially adverse impact on personal growth (Kobasa, 1982). These fears frequently lead to avoidance behaviour which intensifies the fear, and prevents the individual from confronting and overcoming the challenge.

According to Pott (1998), the major difference between challenge as conceptualised by Kobasa and Antonovsky's Sense of Coherence, is that change is viewed as healthy and the norm in Challenge, while stability (the opposite of change) is considered to be the normative and ideal lifestyle in sense of coherence.

7.6.2. Application of hardiness

A number of studies confirm the relevance of hardiness in facilitating people's ability to deal effectively with stressful situations. Research conducted by Maddi and Koshaba (2006) indicated that almost two thirds of the people who were involved in a restructuring process of a major organisation showed significant wellness breakdown. These individuals also indicated lower levels of hardiness. However, the remaining third of the employees managed to maintain high levels of health and performance, despite being faced with exactly the same stressful circumstances. These individuals also indicated higher levels of hardiness. The employees with high levels of hardiness displayed a clearly definable pattern of providing and obtaining support and reassurance to and from others in their work environment.



A study conducted by Harrison et al (2002) revealed that a high level of hardiness is related to lower psychological distress and a more positive appraisal of the work environment. In their study of nurses, they found that those individuals who view themselves as able to influence everyday life events by perceiving them as challenging rather than threatening, also reported fewer symptoms of depression, anxiety, and anger. Their research also indicated that nurses who indicated higher levels of hardiness were more able to make a positive appraisal towards support offered to them by staff or family. The nurses also displayed a better ability to utilize the available social support to decrease the strain caused by stressors.

Based on the results obtained from the research, Harrison et al (2002) conclude that hardiness can be seen as a personal resource that enables individuals to make use of contextual factors such as work support to decrease their psychological distress or to improve their psychological/emotional well-being.

Rhodevault and Agustodttir (as cited in Gonella, 1999) also found that hardy individuals report more positive self-evaluations compared to people indicating low levels of hardiness. They found that, from a physiological perspective, individuals with higher levels of hardiness displayed higher levels of systolic blood pressure. This indicated that they were more successful in utilising active strategies in coping with stress.

Similarly, Moran (2002) asserts that hardy people are not only able to deal with stressors more effectively. They are also less prone to stress related illness and other insidious effects of stress. According to Moran, hardy people may deal with stress better by decreasing negative feelings, or by taking direct action in actively modifying the source of stress. A study by Bartone (as cited in Moran, 2002) on the relationship between hardiness and illness in bus drivers and army assistance workers also found that those individuals who had a high amount of illness scored lower on the hardiness scale than those who had little illness. Based on the results obtained from his study, Bartone concludes that hardiness plays a protective role that helps people cope with extreme stressor situations.



The results obtained from the above mentioned studies confirm that direct interaction takes place between an individual's levels of hardiness and the extent to which he manages to process and cope with stressful events. The results also verify that a positive relationship exists between hardiness and the levels of mental and physical health experienced by an individual. The intention of this present study will be to determine whether the positive results obtained from research studies in a general work environment can be extended to the ability of expatriates to cope with the pressures exerted on them while on international assignment.

7.6.3. Relationship between hardiness and expatriation

As an expatriate, the person is required to remain positive towards constant changes in his work, social, and personal environment, and to find innovative solutions to the problems facing him or her. The person is also required to view these constant changes as being stimulating and conducive to personal growth. In this regard, Kobasa (as cited in Pott, 1998: 53) asserts that one of the critical functions of hardiness is to serve as a buffer that leads the individual to experience stress differently, and facilitates his ability to activate effective coping mechanisms in dealing with the problems facing them.

No directly relevant research studies could be found that evaluate any relationships between Kobasa's hardiness and expatriates' ability to successfully adjust to the pressures of being on international assignment in a foreign country. However, it is deemed appropriate to take note of the observations made by Black et al (1999), who refer to the fact that expatriates' ability to cope effectively provides them with a significant "buffer" against the stress that accompanies their integration into the foreign environment. Black et al make mention of well-adjusted expatriates who are able to develop "*stability zones that function like harbours in a storm*". These zones may include the expatriates spending time expressing their thoughts in diaries, exercising hobbies or other meaningful activities, or engaging in religious worship. By making use of these activities, expatriates are able to withdraw from the constant pressure of having to solve complex business problems in an environment which they do not understand.



Adler (1997) also refers to “*stability zones*” utilised by effective expatriates for coping with the stresses of expatriation. Adler specifically indicates that the best method of coping utilised by the successful expatriate would depend on the particular individual and situation involved. Examples of such effective coping mechanisms mentioned by Adler would be participation in regular physical exercise, practicing meditation and relaxation techniques, keeping a journal, playing a musical instrument, listening to records, or watching video movies in one's native language.

In adjusting to the work environment in the host country, Adler (1997) indicates that the successful expatriate is able to reduce the stress by recognising the underlying causes, and by modifying their expectations and behaviour accordingly. The person is also able to prioritise and concentrate his energy on only the most critical tasks, such as to clearly define their responsibilities, and educate their seniors in the parent company on the cultural and business differences that exist between headquarters and the off-shore operations. A very important point made in this regard by Adler (1997), is that the exact nature of the stability zone and coping mechanisms utilised by the expatriates is less important than their recognition of the highly stressful nature of moving into a new culture, and their development of the appropriate stress reduction technique that works for them.

Neither Black et al (1999) nor Adler (1997) refer directly to the concept of hardiness as a facilitator in dealing with stress. However, it becomes evident from their description of the person's ability to cope by making use of “buffers” and “stability zones” that they are referring to a construct similar to the hardiness concept as discussed by Kobasa (1982). Taking into account these similarities, Kobasa's concept of hardiness seems to have a direct impact on the person's ability to cope with the conditions in the constantly changing expatriate environment, and was consequently included in the study.



In summary, Kobasa's theory hypothesises that a person indicating higher levels of hardiness prefers to rely on active, cognitive, transformational coping strategies which act to cognitively transform a potentially negative event into a growth producing experience. These two mechanisms, in turn, lead to a reduction in the amount of psychological distress experienced by the individual. They also contribute to the long-term psychological well-being of the individual (Harrison et al, 2002; Gonella, 1999). On the other hand, the individual who indicates lower levels of hardiness is more likely to make use of distancing, avoidance, and emotionally focused coping strategies, which lead to the person being more prone towards stress-related illnesses and other negative effects of stress (Harrison et al, 2002; Bissonnette, 1998).

From a general life and work perspective, the research studies included in this study confirm Kobasa's hypothesis that a strong correlation exists between hardiness and the ability to cope with pressure. From an expatriate adjustment perspective, the observations made by both Black et al (1999) and Adler (1997) clearly indicate that the "buffers" and coping mechanisms incorporated into Kobasa's concept of hardiness are of critical importance in facilitating the expatriate's successful adjustment and performance while on assignment. As mentioned earlier, one of the objectives of this present study is to confirm the relevance of hardiness as a facilitator of the expatriate's ability to cope with the stress associated with being on international assignment in a foreign country.

7.7. Expatriate personality

An aspect playing a role in explaining expatriates' successful adjustment while on assignment would be individual personality (Cascio & Aguinis, 2005; Shin et al, 2003; Van der Bank & Rothman, 2002; Guthrie & Ash, 2001). In order to understand the impact of personality on expatriates' adjustment while on international assignment, it is viewed important to obtain a clear view on the concept of personality, as well as its components and characteristics. In this section, individual personality will be discussed within the framework of the "global five factor" model of personality as derived from the Sixteen Factor Personality Questionnaire (Cattell et al, 1988).



Kaplan and Sadock (1991: 128) define personality as “*the totality of emotional and behavioural traits that characterise the person in day-to-day living under ordinary conditions; it is relatively stable and predictable*”. Similarly, Guthrie and Ronald (2001) indicate that a person’s “*personality is a relatively stable precursor of behaviour; it underlies an enduring style of thinking, feeling and acting*”. Moran (2002) adds that personality is not an isolated variable, and that it affects the individual’s involvement with his social environment.

A more comprehensive definition of personality is provided by Piedmont (1998: 2), who defines personality as “*the intrinsic organisation of an individual’s mental world that is stable over time and consistent over situations*”. Piedmont views personality as a dynamic structure that is constantly responding to needs that arise from within and without the individual. Personality as an entity commences in a basic uncomplicated form as a newborn baby, and becomes more sophisticated over time as the person matures. These changes also follow a lawful and orderly path. Piedmont highlights four important aspects included in his definition of personality:

Firstly, personality represents a structured system by which individuals organise themselves and orient the world around them. The system is clearly located *within* the person and is not imposed by the environment. Piedmont (1998: 2) warns that the role of environmental forces such as culture, context, and situations in shaping personality should not be excluded. However, he also indicates that within each personality there is a specific ‘core’ that provides the basis for the person’s needs, the way in which the person perceives and interpret the external world, and the goals he ultimately pursues in life.

Secondly, personality remains constant irrespective of changes taking place in the surrounding environment. Although specific behaviours may change from one context to the next, who the person is and how he perceives the world remains the same. Although the individuals’ behaviours may change, the personal goals pursued by the person remain very much the same (Piedmont, 1998: 2).



Thirdly, personality remains stable over time. This means that the inherent constructs and preferences included in the individual personality remain consistent throughout his life (Piedmont, 1998: 2).

Fourthly, personality consists of a number of relatively stable traits that, although not directly observable, have a direct impact on the behaviours displayed by the individual (Piedmont, 1998: 2).

Meyer et al (1990: 5) define a personality trait as a constellation of covariant functional behavioural patterns that are invoked by equivalent stimulation-situations. Personality traits are not directly observable, and are inferred by means of deductive reasoning. According to Meyer et al (1990: 5), the human being and its various components is a highly complex phenomenon. As a result, they indicate that more than 30 different definitions, models, and theories of personality exist that attempt to classify personality and its various traits (also referred to as characteristics).

For the purposes of this study, it was decided to make use of the five global factors of personality as derived from the Sixteen Factor Personality Questionnaire developed by Dr Raymond Cattell (Cattell et al, 1988). In the following paragraphs, the global five factor model of personality and its various sub-components will be discussed in more detail.

7.7.1. Five factor model of personality

One of the most well-known models in identifying the inherent characteristics included in the individual personality is referred to as the five factor model of personality (Institute for Personality and Ability Testing, 2007). According to Taylor and De Bruin (2006: 3), the five-factor model is widely considered as being the preferred measurement paradigm for personality in a numerical context, both on an applied and on a clinical basis.



Taylor and De Bruin (2006) assert that the five-factor model of personality is the result of research that was conducted making use of the so-called lexical approach to personality description. The lexical hypothesis assumes that most socially relevant and prominent individual differences will become classified as single words in natural language. Therefore, the terms used in describing personality in the lexical model are also the terms that people would use in everyday language to describe themselves and others.

According to Taylor and De Bruin (2006), the big five model of personality is not based on only one specific theory of personality. The model is the result of numerous factor analyses of existing personality inventories which indicated very similar structures when factor analysed. Straker (2007) differs from Taylor and De Bruin in this regard, asserting that Dr. Raymond Cattell was “the father of the big five”. According to Straker (2007), Cattell was the first person to derive five global factors of personality during the 1960s during his investigations on the sixteen primary scales included in the Sixteen Personality Factor Questionnaire (16PF).

The five global factors identified by Cattell (Cattell et al, 1988) are the following: Extraversion, Anxiety proneness, Openness, Independence, and Self-control. Cattell was of the strong opinion that each of these factors is related to one another, and that some of the 16PF primary scales appear in more than only one of the five factors. Cattell’s approach in this regard included an important theoretical difference with more recent researchers of the big five model of personality such as Goldberg, and Costa and McCrae, who view each of the factors to be largely independent of the others (Institute for Personality and Ability Testing, 2007). Despite this, Karson et al (1997) indicates that a strong similarity exists among Cattell’s five global factor model and the other two most commonly accepted five-factor models, notwithstanding differences in the names of the factors. A summary of the three most well-known versions of the five factor model of personality can be seen in Table 7.2 below:

Table 7.2.: Three most commonly accepted five-factor personality models

Cattell	Goldberg	Costa and McCrae
1. Extraversion	1. Surgency	1. Extraversion
2. Anxiety	2. Emotional stability	2. Neuroticism
3. Openness	3. Intellect	3. Openness
4. Independence	4. Agreeableness	4. Agreeableness
5. Self-control	5. Conscientiousness	5. Conscientiousness

(Institute for Personality and Ability Testing, 2007)

A study conducted by Conn and Rieke (as cited in Lord, 2000: 119) concludes that the definitions of the 16PF global factors as developed by Cattell show strong correlations with the interpretations of the five robust factors which make up the Five-Factor model developed by Costa and McCrae.

Based on the above mentioned discussions, it was decided to make use of the global five factor model of personality during this study as derived by Cattell from the 16PF to obtain an indication of the personality traits of the individuals that were sent on international assignments.

The main advantage of utilising the global scores during the analysis of individual personality as opposed to utilising all the primary scores of the 16PF is that the global scores are based on significantly more items than are the primary factor scores. As a result, they are therefore also more reliable (Karson et al, 1997: 70). The primary scores of the 16PF are typically based on 10 to 11 items each. By contrast, each of the global scores is based on from 40 items to 51 items (Karson et al, 1997: 70). Therefore, no single item can have much effect on a global score, and the global scores are more robust than the primary scale scores. As a result, more confidence can be placed in global scores than in primary scale scores during the analysis process.



According to Karson et al (1997), the major disadvantage of using the global scores of the 16PF in analysing individual personality is that they can conceal important elements in an individual's personality. To illustrate this point, Karson et al (1997) use the example of three individuals whose Extraversion global scores are exactly the same. Despite the similarities of the three individuals' scores on the Extraversion global factor, further investigations may indicate that they have significantly different scores on the component factors underlying Extraversion, and therefore would have equally different personality traits. The first individual may demonstrate low levels of sociability (Outgoing), but may also display a compulsive need to be near others. The second individual may tend to cling to others in order to cope with an intense fear of rejection. The third person's results may be indicative of somebody who is warm, outgoing, engaging, and socially effective.

As can be seen from the above mentioned example, a person's score on a global factor does not provide as much information compared to the scores on its component factors. In this regard, Karson et al (1997: 77) assert that it would be important to conduct a more detailed diagnostic investigation on the available individual components when assessing individuals, as opposed to only utilising a mechanistic approach by focusing only on the person's results on the five global factors.

The Institute for Personality and Ability Testing (2007) also cautions that the more specific primary factors of the 16PF should be incorporated when personality assessment is conducted for the purposes of detailed feedback or the prediction of future individual behaviour. According to the Institute, research has shown that more specific factors such as the primary scales of the 16PF tend to predict actual behaviour better than the five global factors.



7.7.2. Primary personality factors included in global five personality factor model

In order to obtain a clearer understanding of the primary personality factors that constitute the global five personality factors, these primary factors will now be discussed:

7.7.2.1. Extraversion

The first global factor included by Cattell (Cattell et al, 1988: 117) into the five global personality factors is referred to as Extraversion (also referred to by Cattell as *Exvia*). Cattell defines Extraversion as a broad temperament trait that indicates the degree to which an individual enjoys being around other people, likes excitement and stimulation, and is cheerful by nature. Harvey and Novicevic (2001) define extraversion as “*the ability to successfully assert oneself and gain acceptance in the social environment through social relationships*”. Typical dimensions included in the Extraversion dimension would be being sociable, gregarious, assertive, etcetera. In addition to liking people and preferring large groups and gatherings, extraverts also tend to be more assertive, active, and talkative (Straker, 2007).

The alternative to Extraversion is referred to as Introversion (also referred to by Cattell as *Invia*). According to Piedmont (1998), it is more difficult to portray the characteristics associated with the introvert compared to an extraverted personality. It is important to note that introversion should be regarded as the absence of extraversion, and not necessarily in the negative sense as its opposite. Within this framework, introverts should be viewed as being reserved as opposed to aloof, independent as opposed to weak, and steady as opposed to slow. Introverts may sometimes refer to shyness as a preference to be alone. It can therefore not be automatically assumed that introverts necessarily suffer from social anxiety (Piedmont, 1998).



Although introverts would not typically display the high levels of enthusiasm associated with extraverts, Costa and McCrae (1992) assert that introverts should therefore not automatically be viewed as being unhappy or pessimistic. Piedmont (1998) agrees with Costa and McCrae in this regard. He is of the view that the clear distinctions made on the definition of introversion form one of the most important conceptual advances of research on the big five-factor model and personality in general.

A summary of each of the primary 16PF factors incorporated by Cattell (2006; 1988; 1970) into the Extraversion global score is herewith provided:

i. Factor A (Extravert)

Factor A measures the individual's emotional perspective towards others – the extent to which the person seeks interaction with others and gains fulfilment out of the contact with them. Cattell (2006) also refers to this as the person's "*affiliative tendency*".

According to Cattell (Cattell et al, 1988: 81), individuals who rate themselves high on Factor A (sten score of 8 to 10) are inclined to be friendly, adaptable, accommodating, cooperative, caring, and sensitive towards others. They prefer occupations where they are allowed to deal with people, and where they can function in a social group context. They are cheerful in their interactions with others, more open towards criticism, and more effective in remembering people's names.

Individuals who rate low on Factor A (sten score of 1 to 3) tend to be more concerned about facts or concepts than in interactions with people. They may care about other people, but are not keen on engaging in "small talk" or casual interactions with others. They may also tend to prefer individual activities where they can spend time on their own (Cattell et al, 1988: 81).



ii. Factor F (Enthusiastic)

Factor F provides an indication of an individual's natural enthusiasm or energy levels (Cattell et al, 1988: 87). According to Cattell, individuals who rate themselves higher on Enthusiasm (sten score of 8 to 10) tend to be more uninhibited, playful, and adventurous in nature. They may tend to lose interest quickly in activities, and prefer moving rapidly from one area of interest to another. Consequently, they are more suited towards occupations where they are allowed to be involved in a number of activities, without becoming intensely involved with any specific one.

Individuals who score low on Enthusiasm (sten score of 1 to 3) tend to be more deliberate, cautious, careful, focused, and serious-minded individuals. They usually prefer concentrating on specific areas that interest them, and tend to be more suitable towards technical specialist positions where they are allowed to specialise in a selected area of expertise (Cattell et al, 1988: 88).

iii. Factor H (Adventurous)

Cattell (Cattell et al, 1988: 91) contends that Factor H measures the extent to which the individual takes risks in a social context. Included in the definition is the person's general orientation towards risk taking of any nature.

High scorers (sten score of 8 to 10) are comfortable to take the initiative during social activities where they are required to interact, network, and engage in small talk with others. They may also tend to be more daring on a social and an adventure-seeking level. In the extreme, they would display a strong preference towards taking risks and "living on the edge" (Cattell et al, 1988: 91).



Low scorers (sten scores of 1 to 3) are normally more reserved and may tend to avoid interacting with others in an informal social level. They prefer having close relationships with a small number of friends, as opposed to informally chatting with people in a larger social context. They also tend to avoid taking risks in general and would typically prefer pursuing less risky opportunities (Cattell et al, 1988: 91).

iv. Factor N (Shrewd)

Factor N refers to openness and the extent to which the individual is willing to allow others to get to know him or herself. It also refers to the ability to refrain from sharing with others information communicated in confidence (Cattell, 1988: 99).

High scorers (sten score of 8 to 1) tend to be cautious and conscious about opening up towards others. They take longer to disclose information on themselves towards others, and may therefore be more difficult to get to know (Cattell et al, 1988: 99).

Low scorers (sten score of 1 to 3) tend to be much quicker at disclosing information, and are not very concerned about sometimes sharing personal information with anybody who is willing to listen. Others may view them as being more open and forthright. However, in the process they may at times tend to share confidential information with others without always taking into account the consequences (Cattell et al, 1988: 99).

v. Factor Q2 (Self-sufficient)

Factor Q2 refers to the propensity of the individual to seek group support or function on his own. According to Cattell (Cattell et al, 1988: 105), individuals scoring high on Self-sufficiency (sten score of 8 to 10) prefer solving problems on their own. They prefer acting autonomously and would typically show a preference towards establishing and running their own businesses. They may experience difficulty delegating tasks to subordinates, and may need to be careful not to isolate themselves from others.



Low scorers (sten scores of 1 to 3) tend to prefer functioning within a group context. They place a high emphasis on teamwork and cooperation, and may experience difficulty functioning autonomously and on their own. They typically prefer working in a corporate environment where they can provide and receive high levels of social support, and where the emphasis falls on the achievement of team objectives rather than individual objectives (Cattell et al, 1988: 105).

7.7.2.2. Anxiety

Anxiety refers to the extent to which the individual is prone to experience anxiety, depression, vulnerability, and other negative emotions in response to his external environment (Cattell et al, 1988: 118). Within the context of the big five personality model, Anxiety is also referred to as the opposite of Emotional Stability.

The following personality factors are included in the Anxiety factor (Cattell et al, 1988):

i. Factor C (Stable)

Cattell et al (1988: 118) contend that Factor C measures the extent to which an individual is prone towards mood swings in his emotional life.

High scorers on Stability (sten scores of 8 to 10) are usually stable in their experience of emotions, and would typically not be prone towards displaying significant mood swings. Consequently, they would tend to be more emotionally mature in remaining focused and rational when placed in stressful circumstances (Cattell et al, 1988: 83).

Low scorers on Factor C (sten score of 1 to 3) tend to experience a wider range of emotional fluctuations in their adjustment to normal life pressures. According to (Cattell et al, 1988: 83), low scorers also typically experience more difficulty coping with pressurised circumstances.



ii. Factor O (Apprehensive)

Cattell et al (1988: 102) indicate that Factor O refers to apprehension within two dimensions. The first dimension refers to a general tendency to become anxious and stressed. The second dimension concerns a tendency to be overly harsh and critical towards oneself, which can also be associated with low self-esteem.

Individuals who score themselves high on apprehension (sten scores of 8 to 10) tend to be highly critical towards themselves. They may also show a tendency to experience higher levels of worry and self-reproach (Cattell et al, 1988: 101).

Low scorers (sten scores of 1 to 3) have a strong belief in their own abilities, and do not spend much time and effort on self-evaluation and introspection. They show high levels of self-confidence. However, Cattell et al (1988: 101) also warn that a person with a very low score on Apprehension may need to be careful not to become complacent, arrogant, and blind towards his own weaknesses and development areas.

iii. Factor L (Suspicious)

Factor L provides an indication of the extent to which the individual is sceptical and suspicious towards others (Cattell et al, 1988: 97).

High scorers (sten score of 8 to 10) tend to be more cautious towards trusting others, and would prefer testing the trustworthiness of others first before showing a willingness to trust them. They tend to be sceptical towards the motives of others, and will not easily allow themselves to be manipulated by parties with ulterior motives. However, they also need to be careful not to become neurotic, imagining a hidden agenda when nothing actually exists (Cattell et al, 1988: 97).



Individuals with low scores on Suspicion (sten scores of 1 to 3) show a stronger tendency to trust others and take them at face value. The positive side of a low score on Suspicion is an intuitive propensity to connect with others, and to inherently trust their motives during one's interactions with them. The negative side to extremely low scores would be the person's tendency to become naïve in dealing with others, and a proneness to attract those who are not as trustworthy (Cattell et al, 1988: 97).

iv. Factor Q4 (Tense)

Factor Q4 refers to the individual's levels of patience in dealing with obstructions, problems and difficulties hampering progress and achievement of plans, pursuits, or objectives (Cattell, 1988: 107).

A high score on Tension (sten score of 8 to 10) indicates towards an individual who is always busy, results-orientated, and focused on achieving progress. The person easily becomes frustrated with perceived delays. In the process, he may tend to display signs of impatience, tension, and irritability (Cattell et al, 1988: 109).

Low scorers (sten score of 1 to 3) tend to be relaxed and patient. They deal with the issues facing them in a calm and relaxed way, without becoming overly upset or stressed. Unfortunately, this could also lead to a loss of internal urgency and action (Cattell et al, 1988: 108).

7.7.2.3. Openness

Cattell et al (1988) refer to Openness as the individual's willingness to experience new or different things and is curious about him- or herself and the world. Typical dimensions included in the Openness dimension would be being imaginative, curious, original, broadminded, etc. The Big Five Personality factor equivalent to Openness is referred to as Receptivity (Lord, 2000).



On the 16PF, a combination of the following factors provides an overall score on Openness (Lord, 2000: 77). As can be seen in the previous paragraphs, Factor A was also included as a contributing factor in the Extraversion global factor.

i. Factor A (Extrovert)

Factor A has already been defined in the discussion on Extraversion as a dimension included in the global five factor personality model.

ii. Factor M (Imaginative)

Factor M refers to the individual's inclination towards practicality versus creativity. Imaginative also incorporates a strictly hands-on operational approach towards life, versus an inventive strategic perspective (Cattell, 2006).

Individuals who score themselves highly on Imaginative (sten score of 8 to 10) are typically viewed as being innovative, original, and perceptive. They often prefer coming up with new concepts and ideas, but may not necessarily be interested in the practical implementation of such ideas and concepts. They prefer making use of a strategic approach in dealing with problems. In the process, they may tend to overlook the practical details involved with the problems. When placed under extreme pressure, they may tend to become obsessive about small details that they would not give any attention to under normal circumstances (Cattell et al, 1988: 98).

Low scorers (indicating a sten score of 1 to 3) prefer making use of a strongly factual and hands-on approach when making decisions. They place a high emphasis on the achievement of immediate operational objectives and deadlines. Their focus is generally tactical and short term. However, in the process they may at times overlook wider meanings and implications, and can be overly critical about details. When placed under extreme pressure they may show a propensity to catastrophise over potentially severe consequences (Cattell et al, 1988: 98).



iii. Factor I (Sensitive)

According to Cattell (2006), Factor I is a relatively complex factor. It measures two characteristics: factual objectivity versus intuitive subjectivity, and tough mindedness versus tender mindedness.

Individuals scoring high on Sensitivity (sten score 8 to 10) tend to be considerate, tactful, perceptive. They would show a stronger propensity to make decisions based on the more subjective evaluation of the personal values or the interests of others. These characteristics make them more suitable towards roles that require high levels of interpersonal sensitivity. However, they may also at times lack objectivity, and may at times tend to overlook the facts on specific issues (Cattell et al, 1988: 93).

Low scorers (sten score 1 to 3) tend to be logical, rational and objective, and prefer basing their decisions on facts and potential consequences. Consequently, they tend to be more suitable towards roles that require objective and factual analysis of facts and ideas, as opposed to taking care of people's personal needs and interests. However, in the extreme they may lack sensitivity and diplomacy. They may also be out of touch with their own emotions and needs, as well as those of others (Cattell et al, 1988: 93).

iv. Factor Q1 (Liberal)

Cattell et al (1988) assert that Factor Q1 concerns the individual's orientation to change, novelty, and innovation. High scorers (sten score of 8 to 10) are viewed as free thinkers who prefer functioning in a constantly changing, flexible and dynamic environment. They tend to become bored and lose interest quickly in situations that do not provide sufficient change and variety. In the extreme, they may tend to go overboard by initiating change solely for the sake of change, or by becoming overly intolerant towards tradition, convention, and stability (Cattell et al, 1988: 103).



A low score on Liberal (sten score 1 to 3) suggests a more conservative individual who prefers the traditional, established, and tried and time-tested approach. The person prefers maintaining the existing status quo, and may tend to become suspicious and resistant towards situations that require constant adjustment to change. In the extreme, they may tend to obstruct change and may be viewed by others as being reactive (Cattell et al, 1988).

7.7.2.4. Independence

Independence refers to the extent to which a person is able to get along with other people, and has compassion for others (Institute for Personality and Ability Testing, 2007). Typical dimensions included in the Independence dimension would be being persuasive, straightforward, wilful, etcetera. Cattell et al (1988) incorporate the following primary 16PF factors into the Independence factor:

i. Factor E (Assertiveness)

Factor E provides an indication of the extent to which an individual is dominant versus submissive during his interactions with others (Cattell et al, 1988: 85).

People scoring high on Assertiveness enjoy taking charge of others. They prefer being in positions of power, and often possess well-developed natural leadership qualities. They enjoy functioning in a competitive environment where they are required to beat other opposing parties (Cattell et al, 1988: 86).

Low scorers tend to be more submissive, and prefer meeting the needs and interests of others – often to their own detriment. They do not like dealing with conflict, and place a high emphasis on ensuring harmony and cooperation with people they come in contact with. They typically do not prefer being placed in leadership positions (Cattell et al, 1988: 86).



ii. Factor H (Adventurous)

Factor H evaluates the individual's ability and willingness to take initiative within a social setting (Cattell et al, 1988). Cattell (2006) later adds that an orientation towards risk taking in general is also included to some extent in the Adventurous factor.

Individuals scoring high on Factor H prefer taking the initiative during social interactions, and enjoy participating in activities such as networking, sales, and general conversation. They also tend to display more boldness and self-assurance in social and physical danger situations. In the extreme, they may display a very strong preference towards adventure or "living on the edge" (Cattell, 1988: 92).

Low scorers tend to be more introverted and may experience difficulty taking the initiative during interpersonal situations. They prefer having more intimate relations with a smaller number of close friends, as opposed to having to interact with many strangers in an unstructured group context. They may also tend to avoid situations that are viewed as being overly risky and uncertain (Cattell et al, 1988: 91).

iii. Factor L: Suspicious

Suspicion reflects to the balance between trust and scepticism. Suspicion has already been discussed in Paragraph 7.7.2.2 of this chapter.

iv. Factor Q1: Liberal

Factor Q1 refers to an individual's perspective towards change and unfamiliarity. The factor has already been described in earlier paragraphs.



7.7.2.5. Self-control

Self-control is defined by Cattell (2006) as the extent to which the person effectively and efficiently plans, organises, and carries out tasks. The big five personality factor equivalent to Self-control is referred to as Conscientiousness (Straker, 2007). Typical dimensions included in the Self-control dimension would be being dependable, reliable, careful, thorough, etcetera.

i. Factor F (Enthusiastic)

Factor F provides an indication of an individual's natural levels of enthusiasm or excitement. The factor has already been described in earlier paragraphs of this chapter.

ii. Factor G (Conscientious)

Factor G assesses an individual's perspective towards moral concerns, regulations, and social expectations. According to Cattell et al (1988: 89), conscientiousness is a "*measure of ethical and moral responsibility and dutifulness*".

Individuals scoring high on conscientiousness (indicating a sten score of 8 to 10) are usually highly ethically driven and responsible. They also tend to be driven by clearly defined rules and principles.

Low scorers (indicating a sten score of 1 to 3) tend to be more "undependable". They show a stronger propensity to view rules as mere guidelines that can be broken or ignored depending on the circumstances at hand. Although this does not necessarily mean that the person is unethical in his actions, it does indicate a different perspective towards life where the achievement of desired results is viewed as more important than the adherence to rules and social standards (Cattell et al, 1988: 88).



iii. Factor M (Imaginative)

Factor M refers to practical realism versus creativity. This factor has already been discussed in more detail earlier in this chapter.

iv. Factor Q3 (Control)

Factor Q3 is related to the individual's tendency towards perfectionism (Institute for Personality and Ability Testing, 2007).

Cattell et al (1988: 106) state that a person scoring high on Control (sten score of 8 to 10) typically displays socially accepted responses, self-control, persistence, a consideration towards others, as well as a high regard for etiquette and social reputation. Cattell et al (1988: 107) also associate a high score on Factor Q3 with occupations that require high levels of objectivity, balance, and decisiveness. In extreme cases, these characteristics could lead to an individual becoming rigid, inflexible, and unable to adjust to quickly changing conditions. According to the Institute of Personality and Ability Testing (2007), individuals scoring high on Control tend to lose efficiency as the amount of structure provided in their external environment decreases.

A low score on Control (sten score of 1 to 3) is associated by Cattell (2006) with an individual who tends to be more flexible, adaptable, and spontaneous. In the extreme, this individual may show signs of procrastination, perceived laziness, and an inability to hold him or herself accountable.

7.7.3. Relationship between global five personality factors and expatriation

Van der Bank and Rothman (2002) assert that personality characteristics play a central role in predicting whether individuals will succeed in their expatriate assignments. Research conducted by Caligiuri (2000) also confirms the role of personality in expatriate adjustment and success.



However, Guthrie and Ash (2003) assert that there is a lack of definite research confirming the strong relationship between individual personality and expatriate success. One of the possible reasons highlighted by Grove and Hallowell (2006) for this lack of scientific support would be the fact that paper-and-pencil personality assessments were not found very successful in predicting future success as an expatriate. Grove and Hallowell (2006) also assert that it is not possible to reliably predict in advance whether an individual will be successful as an expatriate. According to them, there are too many factors having an impact on the individual's success, many having no relation to the individual. For this reason, Grove and Hallowell go so far as to indicate that expatriate candidate assessment can have only one attainable objective: *“to identify candidates who are most at risk of failure in an unfamiliar culture due to obvious concerns or low readiness”*.

Despite the criticism towards using personality assessment instruments during the selection of expatriates, the results obtained from such assessments can provide very useful information on the adjustment processes used by individuals during their adjustment to the unknown environment in the foreign country (Cascio & Aguinis, 2005; Guthrie & Ash, 2003).

Of interest in this regard would be the findings of a study conducted by Adler (1997), which provided a ranking of key characteristics of the successful expatriate as identified by multinational companies:

Table 7.3.: Key characteristics of the international manager

Factor	Percentage*
Strategic awareness	71%
Adaptability in new situations	67%
Sensitivity to different cultures	60%
Ability to work in international teams	56%
Language skills	46%
Understanding international marketing	46%
Relationship skills	40%
International negotiation skills	38%
Self-reliance	27%
High task-orientation	19%
Open, non-judgmental personality	19%
Understanding international finance	13%
Awareness of own cultural background	2%

* Percentage of respondents ranking a characteristic as among the five most important

(Adler, 1997)

As illustrated by the results displayed in Table 7.3, the dimensions included in the global five model of personality (Extraversion, Anxiety, Openness, Independence, and Self-control) can at face value be associated quite easily with almost all of the essential characteristics required by successful expatriates. Three potential exceptions in this regard would be “Understanding international marketing”, “Understanding international finance”, and “Awareness of own cultural background”, which can be associated with the knowledge and experience base of the individual.



An example of the possible relations existing between the big five factors and the key international manager characteristics would be Extraversion, which can be associated with the following potential key expatriate characteristics included in Table 7.3: Sensitivity to different cultures, ability to work in international teams, language skills, relationship skills, and international negotiation skills.

A more detailed discussion will now be conducted on the relationships found in research between the global five personality factors and successful expatriation. During the literature study conducted for this study, limited research references could be identified indicating any significant relationships between the global five personality factors as identified by Cattell, and successful expatriation. However, a number of other researchers have published positive results confirming the relationship between personality and expatriation, by making use of the other two most commonly accepted five-factor personality models presented by Goldberg, and Costa and McCrae. These research findings will also be incorporated into the study. In order for a meaningful discussion to be conducted in this regard, it would be important to keep in mind the findings of Conn and Rieke (as cited in Lord, 2000: 119) and Karson et al (1997) that strong similarities exist among Cattell's five global factor model and the five-factor personality models of Goldberg, and Costa and McCrae, despite the differences in the names of the factors included in the respective models (a more detailed discussion in this regard can be seen in Paragraph 7.7.1 in this chapter).

7.7.3.1. Extraversion

From an expatriate perspective, Cascio and Aguinis (2005) indicate that a positive correlation exists between Extraversion and the interpersonal aspects associated with expatriate performance. They also found that higher scores on Extraversion are related to more effective teamwork – especially in positions where working in a team comprises an important component of the work.



Research conducted by Caligiuri (2000) indicates that extraversion is negatively correlated with expatriates' desire to end their assignments prematurely. On the other hand, Caligiuri also found that low Extraversion is a significant predictor of the expatriates' propensity to prematurely end assignments. Further studies conducted by Mount (as cited in Van der Bank & Rothmann, 2002) suggest that Extraversion is related to the job performance of expatriates, specifically related to their levels of motivation, commitment and interpersonal relationships with others.

From a more practical perspective, both Guthrie et al (2003) and Black et al (1999: 60) agree with the above mentioned research findings, indicating that the ability and willingness of the expatriate to engage in meaningful relationships with others has a positive impact on his adjustment to the external environment. According to them, the expatriate's willingness to develop relationships will to a large extent assist him to develop meaningful relationships with local nationals. In the process, the person will also have access to very valuable information relating to the work and the social environment.

Taking into account the above mentioned research findings and observations, indications are that Extraversion as an individual component of the global five personality factor model can potentially make a positive contribution in explaining some of the results of the study. It was therefore decided to include Extraversion in the study.

7.7.3.2. Anxiety (Emotional Stability)

The big five personality factor equivalent to Anxiety is referred to as Emotional Stability (Lord, 2000). From a general work perspective, research indicates that Emotional Stability (the opposite of Anxiety) is positively correlated with job performance in almost all work environments (Cascio & Aguinis, 2005; Van der Bank & Rothmann, 2002).



Within an expatriate perspective, emotional stability is considered a critical personal characteristic that enables the individual to cope with the pressures related to the unstructured and disorganised expatriate work and living environment (Cascio & Aguinis, 2005; Melles, 2005).

According to Van Oudenhoven et al (2002), emotional stability should be considered as a necessary characteristic of the successful expatriate. In their review of critical success factors for expatriates, they indicate that emotional stability emerges as the strongest predictor of expatriate performance across all the various expatriate manager job types, varying from executive to operator.

Van Oudenhoven et al (2002) specifically include the emotional stability factor as a facilitative factor in the person's ability to manage the stresses associated with the various phases of the international career cycle. They define emotional stability as *"one's ability to manage difficult and challenging situations without suffering from apprehension or a lapse into insecurity"*. Jordan and Cartwright (1998) agree with Van Oudenhoven et al (2002) in this regard, indicating that emotional stability plays a critical role in coping with the culture shock and other pressures associated with the individual cross-cultural experience.

Further research conducted by Caligiuri (2000) found that emotional stability correlates positively with expatriates' commitment to remain on assignment. However, when it was entered in a regression analyses with other personality characteristics, emotional stability did not emerge as being of high importance. In this regard, Van der Bank and Rothmann (2002) indicate that other factors such as family adjustment also impact considerably on the emotional health of expatriates, and that personality forms only one small part of an expatriate's stress-coping mechanism.



The purpose of including Anxiety (Emotional Stability) in this research is specifically to determine its importance in promoting the expatriate's adjustment to the environment in the host country, as well as to determine the interaction that may exist between this factor and sense of coherence and hardiness as internal health protective factors. In this regard, Van der Bank and Rothman (2002) are of the opinion that "psychological strengths" such as the sense of coherence could be included to support the emotional stability dimension in facilitating the expatriate's effective work performance, and in acting as a buffer against the expatriate's desire to prematurely terminate the assignment.

7.7.3.3. Openness

The big five personality factor equivalent to Openness is referred to as Receptivity (Lord, 2000). Harvey and Novicevic (2001) provide a more expatriate-specific definition for the Openness/Receptivity factor, describing it as the expatriates' "*ability to maintain an awareness of the environment to allow for adaptation of their behaviour to changing circumstances in that environment*".

Van der Bank and Rothmann (2002) indicate that individuals scoring higher on Openness have more positive attitudes toward learning, experiencing new things, and perceiving challenges as opportunities for growth. Therefore, they hypothesise that individuals high in receptivity are likely to perceive greater personal accomplishment in their interactive adjustment to the host country and job performance.

Consistent with the above mentioned opinions, Caligiuri (2000) suggests that successful expatriates must possess "*cognitive complexity and intuitive perceptual acuity*". These attributes enable them to accurately observe and interpret the local culture, and perform in an unknown and ambiguous work environment. Caligiuri also indicates that greater openness is positively related to expatriate adjustment, because individuals who indicate higher scores on this personality characteristic tend to be more flexible in accepting the host culture. They are also less judgemental in their evaluation of what is right and wrong, and what is appropriate and inappropriate.



From a practical perspective, Black et al (1999) refer to the concept of Openness as “flexibility”, which they define as the expatriate’s readiness to try new things. According to them, expatriates who are sufficiently adventurous and willing to expose themselves to new ways of doing things are much more likely to adjust effectively to the foreign environment in the host country.

In line with the opinion expressed by Black et al, Van Oudenhoven et al (2002) refer to Openness as open mindedness, indicating the extent to which the expatriate “*has an open and unprejudiced attitude towards different cultural norms and values*”. According to them, expatriates who are more open minded tend to be less judgmental and more tolerant towards the way people from other cultures live.

Taking into account the above mentioned observations, the inference can therefore be made that expatriates who are able to accurately interpret the social environment, and who possess the perceptual ability to correctly observe and translate the local culture, should be able to perform successfully in the more complex and ambiguous work environment in the host country. Within the framework of these discussions, it was decided to include Openness as a factor in this study.

7.7.3.4. Independence (Accommodation)

According to Lord (2000), the big five personality factor equivalent to Independence is referred to as Accommodation. From an expatriate point of view, Harvey and Novicevic (2001) refer to the accommodating expatriate (scoring low on Independence) as a team player who possesses the ability to form meaningful social relationships, alliances, and to establish valuable alliances in the work and business environment.



Van Weerdenburg (2006) refers to Accommodation as the ability to build rapport, which he views as a critical requirement for interacting successfully with people from other cultures, as it promotes trusting relationships and a constructive work environment. Skills associated with building rapport would be the ability to match body language, build areas of common interest, and to manage areas of conflict. Black et al (1997) also assert that a person's ability to develop significant relationships with others has a positive impact on his adjustment to the expatriate environment.

Van der Bank and Rothman (2002) indicate that accommodating expatriates (scoring low on Independence) have a stronger ability to establish and sustain meaningful relationships within the work environment and in the general social environment. They also tend to be more adaptive, which also leads to them being more successful in completing their assignments. On the other hand, expatriates who score low on the Accommodation dimension (high on Independence) tend to be more argumentative, inflexible, uncooperative, uncaring, intolerant and disagreeable. As a result, they also tend to receive lower ratings on the quality of their relations with others at work, which in turn have a negative impact on their ability to integrate themselves into the social environment in the foreign country. Jordan and Cartwright (1998) are of the opinion that the Accommodation dimension may have more relevance to expatriate positions that require considerable interpersonal interaction with others.

From a practical research perspective, Van der Bank and Rothman (2002) found that Accommodation indicated an inverse correlation with expatriates' desire to end their assignments prematurely. Black and Gregersen (1999) report similar results, indicating that expatriates who are more accommodating tend to report higher levels of cross-cultural adjustment.



The above mentioned observations indicate that the expatriate's ability and willingness to be accommodating during his interactions with others in the expatriate environment is not only applicable to the person's ability to maintain positive relations with others in the work and personal environment. It also has direct relevance to the individual's expected willingness to successfully complete the international assignment. Based on these observations, it was decided to include Accommodation (and Independence as its inverse) as a dimension in this study.

7.7.3.5. Self-control

From a general work perspective, Lord (2002: 119) found Self-control to be the strongest and most consistent predictor of job performance. Cascio and Aguinis (2005) agree with Lord in this regard, indicating validity coefficients of between 0.23 and 0.31 across a variety of criterion types and occupational groups. These strong validities emphasise the importance of the Self-control factor as a variable to be taken into account as a predictor of overall job performance.

Within the framework of the expatriate environment, Harvey and Novicevic (2001) indicate that the predictive power of self-control towards domestic work performance can be extended to the expatriate arena. They quote Barrick and Mount, who identified Self-control as the most accurate single predictor of expatriate performance. Research conducted by Caligiuri (2000) confirms these results, indicating that self-control was positively associated with supervisor-rated performance for all expatriate occupational groups, as well as success in completing the international assignment. Commenting on these results, Van der Bank and Rothman (2002) come to the conclusion that an elevated level of self-control is positively related to expatriate work performance, as well as the successful completion of the expatriate assignment.



However, both Van der Bank and Rothman (2002) and the Institute of Personality and Ability Testing (2007) also caution against a person indicating too high levels of self-control. If the person tends to be overly controlled, the possibility exists that he may tend to place too much emphasis on the opinions of others towards him or herself. The individual may also tend to set himself unrealistically high and unattainable goals out of fear of disapproval by his peers or superiors.

According to Van der Bank and Rothman (2002), the danger of this situation is that the person may try too hard to meet the perceived expectations of others in order to hide his own underlying insecurity and lack of self-esteem (therefore over-reliance on the esteem of others). As the person is required to deal with the increased levels of responsibility as an expatriate in a more unstructured and ambiguous foreign environment, the possibility exists that he may not be able to cope with the significantly elevated levels of pressure. In the process, significant damage can be done to the person's self-esteem and belief in his own competence as a person and as an expatriate manager.

From the above mentioned discussions it becomes evident that the big five personality factors (incorporating Cattell's global five personality factors) have direct relevance to the expatriate's ability to succeed. In this regard, Kozloff (1996) indicates that the expatriate's actual job performance and his adjustment to the host country environment are two independent expatriate success factors that are dependent on specific underlying personality traits.

Within the framework of Cattell's five global personality factors, Guthrie and Ash (2003) come to the conclusion that expatriates who are more extroverted, open, accommodating (low on Independence) are more likely to successfully integrate themselves into the foreign environment, and less likely to indicate an inclination to end their assignment prematurely. Those individuals who are more emotionally stable and who display relatively high levels of self-control are more probable to have their work performance evaluated positively by their superiors.



From the above mentioned discussions, it is evident that the global five personality factors have direct relevance on the ability of the expatriate to effectively perform while on international assignment. It was therefore decided to include the five factors in this research project.

7.8. Summary

In Chapter 7 a detailed investigation was conducted on the personal attributes and personality traits that facilitate the expatriate's ability to remain emotionally healthy and deal with the pressures related to being placed on an international assignment. This discussion forms the final part of Section 2 of this research, where the interaction between the expatriate and his external environment during the various phases of the international assignment was discussed. This discussion provides the theoretical background to the actual purpose of the present research, which is to determine whether relationships exist between the expatriate's levels of emotional health, personality, and his perception of the organisational climate while on international assignment, and to present the outcomes of the study as a model.

In Chapters 4, 5, 6, and 7 of this study a detailed conceptual analysis was conducted on the dynamics involved with an expatriate being sent on an international assignment. Specific attention was given to the dynamic relationship that exists between the external expatriate environment, the ability of the person to cope with this environment, as well as the impact of the person's personality in successfully adjusting and performing as an expatriate. This investigation provides the theoretical basis for the practical research conducted in this study, which will be discussed in detail in Chapters 8, 9, and 10.



Section 3

Empirical research

Overview

Section 3 covers the empirical research that was conducted during this study, and is divided into four chapters.

Chapter 8 discusses the research design and methodology that was utilised in investigating the research objectives and associated postulates.

In Chapter 9, the results obtained from the statistical research are described.

Chapter 10 provides a detailed discussion of the statistical results obtained within the context of the set research objectives.

Finally, in Chapter 11 conclusions obtained from the study are discussed. Recommendations for future research are provided in this chapter, with specific reference to any limitations that could be identified in the study in the process of achieving the established research objectives.

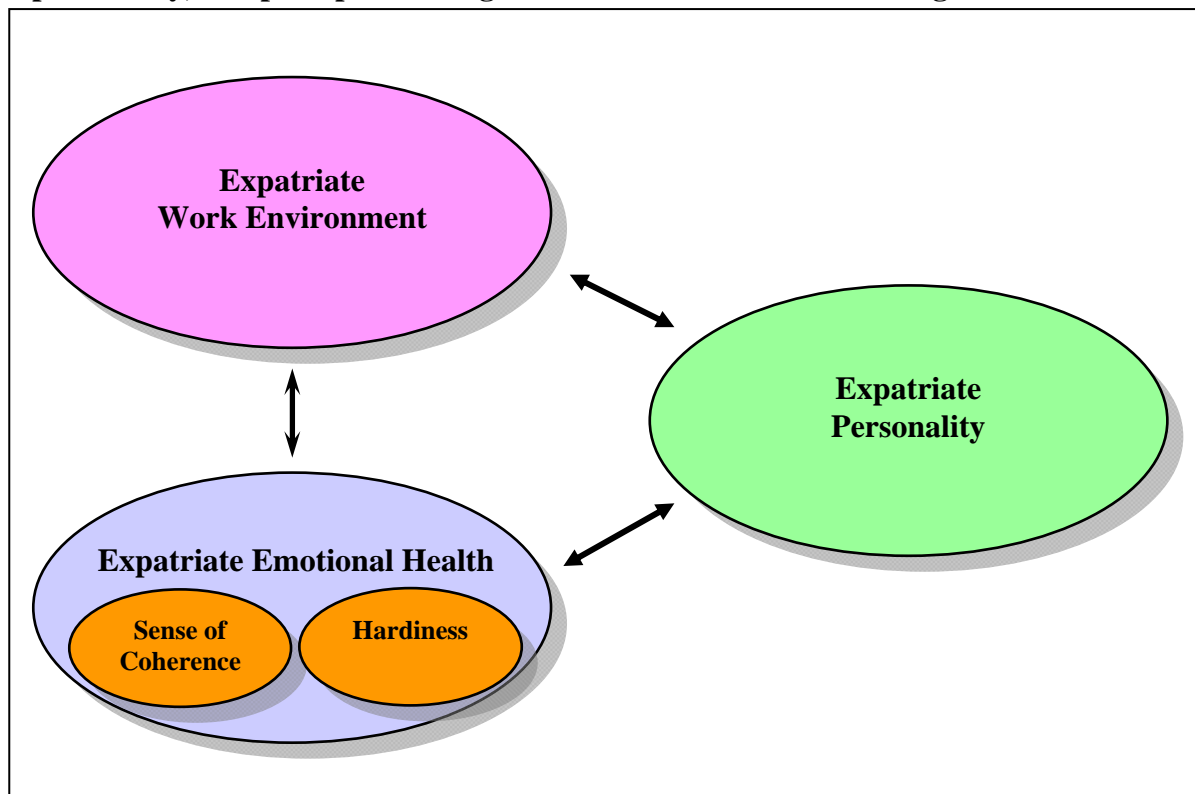
Chapter 8

Research methodology

8.1. Introduction

In Chapter 1 of this study it was postulated that a relationship exists between the expatriate's levels of emotional health, personality, and his perception of the organisational climate while on international assignment in a foreign country, and that this relationship can be incorporated into a model. A graphical layout of the postulated model is presented in Figure 8.1 below:

Figure 8.1: Model displaying possible relationships among expatriate emotional health, personality, and perception of organisational climate while on assignment



In order to investigate the nature of this relationship, the following research objectives were established:

- Objective 1: To establish the impact of the expatriation process on the individual's emotional health;
- Objective 2: To establish the interaction that exists between the expatriate personality and the individual's emotional adjustment during the various phases of the expatriation process;
- Objective 3: To establish the impact of organisational climate factors on the emotional adjustment of the individual prior to departure on the international assignment, and while on contract;
- Objective 4: To establish the nature of the interaction that exists between the expatriate personality and the individual's perception of the organisational climate.
- Objective 5: To investigate the main personality and organisational climate predictors of the expatriate's levels of emotional health while on an international assignment in a foreign country.

In order to achieve the above mentioned objectives, an experimental group consisting of 84 expatriates was assessed on the following self-assessment instruments prior to their departure on international assignments to foreign countries:

- Antonovsky's Sense of Coherence Scale (Antonovsky, 1993);
- Kobasa's Hardiness Scale (Kobasa, 1982);
- Cattell's Sixteen Personality Factor Questionnaire Version SA-92 (Prinsloo, 1996);
- Organisational Climate Questionnaire (Kossuth, 1998).

A follow-up assessment was conducted on the same individuals after they had been on assignment as expatriates in the foreign countries for a period of six months. The individuals completed the same questionnaires in the host countries as part of a continuous support process that is provided to the expatriates while on assignment. The Sixteen Personality Factor Questionnaire was not included during the follow-up assessment, as the questionnaire formed part of the pre-assignment counselling process conducted with the prospective expatriates prior to their departure on the international assignments.

A final assessment was conducted on the individuals on their repatriation to South Africa as their home country after completing their expatriation contracts. This assessment took place as part of a debriefing process conducted with the returning expatriates between periods of one week to three months after their arrival back in South Africa. On this occasion, returning expatriates were assessed on the Sense of Meaning and Hardiness Scales. The reason for not including the Organisational Climate Questionnaire was that the individuals returning from their international assignments were not formally employed with their companies anymore.

A non-moving control group of 42 individuals who remained in South Africa was also included in the study. The reason for making use of the control group was to compare the results obtained from the expatriates who were exposed to the typical psychological adjustment processes associated with the expatriate international career cycle, with those of the control group who did not go through any planned psychological change processes. The individuals included in the control group were assessed on the same measuring instruments at the same time intervals as the individuals in the experimental group.

Mouton (2001: 123) specifies that the chapter discussing the research design followed during a study needs to highlight the following areas:

- The research hypotheses need to be defined and illuminated;
- The research design utilised in the study needs to be described;
- The sample and sampling process utilised during the study needs to be clarified;
- The variables and measuring instruments utilised in this study need to be described;
- Data capturing and data editing need to be discussed;
- The statistical methods and procedures utilised during the study need to be specified.



In line with the recommendations made by Mouton, the research design in this study was conducted in accordance with the above mentioned steps.

8.2. Research hypotheses

Taylor (2006: 20) defines a hypothesis as a tentative statement about the relationship between two variables. A more comprehensive definition of the term is provided by Porkess (2004: 120), who defines a hypothesis as *“a theory which is put forward either because it is believed to be true or because it is used as a basis for argument, but which has not been proved”*.

According to Taylor (2006: 20), in order for a hypothesis to be valid, it needs to meet two criteria:

- The hypothesis should describe a relationship between two or more variables;
- It must be possible to empirically test the hypothesis.

In accordance with the above mentioned criteria, the following hypotheses were investigated in this study:

Overall postulate (in line with Research Objective 5): Meaningful relationships exist between the expatriate's levels of emotional health, personality, and his perception of the organisational climate while on international assignment. These relationships can be presented in the form of a model.

Postulate 1: The emotional health of the individual expatriate is significantly and negatively influenced during the three phases of the international career cycle.

Hypothesis 1a: The individual's sense of meaning decreases from prior to assignment to six months into the assignment.



Hypothesis 1b: The individual's sense of meaning decreases from six months into the assignment to after completion of assignment.

Hypothesis 1c: The individual's hardiness decreases from prior to assignment to six months into the assignment.

Hypothesis 1d: The individual's hardiness decreases from six months into the assignment to after completion of assignment.

Postulate 2: A direct correlation exists between the individual's personality traits and the individual's emotional adjustment during the assignment.

Hypothesis 2a: Individual personality traits are correlated with sense of coherence during the assignment

Hypothesis 2b: Individual personality traits are correlated with hardiness during the assignment.

Postulate 3: The organisational climate prior to and during the international assignment has a significant influence on the levels of emotional health of the expatriate.

Hypothesis 3a: Organisational climate prior to assignment is correlated with sense of coherence prior to departure on assignment.

Hypothesis 3b: Organisational climate prior to assignment is correlated with hardiness prior to departure on assignment.

Hypothesis 3c: Organisational climate during assignment is correlated with sense of coherence during assignment.



Hypothesis 3d: Organisational climate during assignment is correlated with hardiness during assignment.

Postulate 4: A direct correlation exists between the individual's personality traits and the individual perception of the organisational climate prior to and during assignment.

Hypothesis 4a: Individual personality traits are correlated with organisational climate factors prior to assignment.

Hypothesis 4b: Individual personality traits are correlated with organisational climate factors during assignment.

In order to ensure a scientific evaluation of the above mentioned hypotheses, the following research design was followed during this study:

8.3. Research design

The concept research design refers to how the research is conducted. Taylor (2006: 21) strongly asserts that the design utilised in conducting the research can never be viewed independently from other decisions taken in the research process, such as the nature of the research problem to be investigated. The choice of a research design is determined largely by the research problem. The research problem that needs to be solved determines how the researcher will go about in investigating the question. In achieving the research objective as established in the introductory paragraph of Chapter 8, the research design utilised in this study is discussed below.

8.3.1. Research methodology

During the conduct of this study use was made of quantitative research. The results obtained from the various assessment instruments during the various phases of the expatriation process were utilised to assess the emotional well-being of the expatriate during these phases. An attempt was then made to generalise the results and inferences to the population of individuals involved with expatriation to different foreign countries.

An aspect that has created a significant amount of debate among researchers is the relative value of the qualitative and quantitative approaches towards conducting social research (Jacobs et al, 2003: 15). According to Frandberg & Kjellman (2005: 25), the best approach to utilise depends on the research questions and the purpose of the study.

The purpose of making use of a qualitative research approach is to gain a better understanding of data that is not quantifiable. Quantitative research consists of the gathering of quantitative information by means of questionnaires, the generalisation of the collected information, and the presentation thereof in tables and diagrams. The purpose of the quantitative research approach is to test hypothetical generalisations by making use of experimental methods and quantitative measures (Frandberg & Kjellman, 2005: 25).

On the other hand, qualitative data is based on meanings expressed by means of words, and analysed through the use of conceptualisation. Researchers using the qualitative approach prefer applying a naturalistic approach where they attempt to obtain a better understanding of phenomena within a specific context (Frandberg & Kjellman, 2005: 25).

Each of the two research approaches is therefore based on a fundamentally different investigative paradigm, and the actions taken by the researcher are based on the underlying hypotheses presented by each paradigm. While qualitative researchers attempt to highlight, understand and analyse the conceptual problems at hand, quantitative researchers place their focus on the identification of interactions and causal links among factors, to predict future phenomena, and to generalise these findings to a larger population (Jacobs et al, 1992: 15).

8.3.2. Experimental research design

The specific experimental research design utilised during this study is the quasi-experimental design. The process followed in obtaining the relevant data for this research project formed part of a larger intervention that was utilised to select, prepare, and counsel prospective expatriates prior to their departure on their international assignments, as well as to provide those selected individuals with continuous support as they progressed through the various phases of the expatriation process. The role of the researcher in this larger intervention is to provide professional consulting and support services to the management and expatriates of the multinational companies involved.

The individuals included in the experimental group were identified by their prospective employers as suitable candidates for expatriation prior to their participation in the research project. It was therefore not possible to have any control over the individuals included in the experimental group.

The fact that the members of the experimental group were exposed to a pre-departure preparation prior to their departure on assignment may potentially have had a positive impact on their ability to cope with the demands placed on them while on international assignment, and on their repatriation. This is not viewed as an area of major concern, as it may have ensured the availability of their assessment results while on assignment and on their repatriation. Taking into account the difficulties associated with obtaining a sufficient sample size of individuals when making use of a longitudinal study (Baker, 1988), the actions taken in ensuring the availability of the assessment results during the various phases of the expatriation process were deemed appropriate.

The subjects included in the control group were drawn from applicants who were put through a traditional competence assessment centre to be considered for possible appointment or promotion into managerial positions in domestic companies in South Africa. As in the case with the experimental group, no control could be exerted over the individuals included in the control group.

Taking into account the above mentioned observations, it was not possible to make use of random assignment to allocate the individuals to either the experimental group or the control group. The quasi-experimental design was identified as the appropriate approach to utilise during this study. In order to effectively deal with the limitations of not being able to randomly assign individuals to the experimental and control groups utilised in the study, Baker (1988: 223) recommends that the non-equivalent control group design be utilised as the appropriate quasi-experimental design. Baker (1988) indicates that the non-equivalent control group design has the following characteristics:

- The design consists of two groups, namely an experimental and a control group;
- These two groups are potentially “non-equivalent.” This means that they are not necessarily equal at the beginning of the research, because it was not possible for them to be randomly assigned. It is important to note the comparisons conducted on the experimental and control groups in this study (as can be seen in Paragraph 8.4.2), which indicated that the two groups were actually very similar and equal in their demographics prior to the experimental group’s departure on assignment;
- An attempt is made to compare the groups by making use of a pre-test to compensate for the fact that they could not be randomly assigned.

In line with the requirements for the non-equivalent control group design, the characteristics of the experimental and control groups included in the study were compared after their initial assessment prior to the departure of the subjects included in the experimental group on their international assignments.

8.3.3. Timeframe of data gathering

Baker (1988) asserts that it is important to determine the timeframe within which the particular study is carried out. According to Baker (1988: 101), there are primarily two approaches to conduct a research study in time, namely the cross-sectional and the longitudinal study.

The cross-sectional study is utilised when all the data relevant to the particular phenomenon under investigation is being observed or gathered at a single point in time, or in a relatively short period of time (Baker, 1988: 101). A disadvantage of this design is that processes and changes that take place over time cannot be established and investigated.

The longitudinal study is typically utilised where a research project has two or more data collection periods which are set at different times for the specific purposes of investigating changes that may or may not have taken place between these points in time (Baker, 1988). The longitudinal study has an advantage over the cross-sectional study, as it indicates changes that occur over time, as opposed to only concentrating at a static score at a particular moment in time. Taking into account the fact that assessment results were obtained from the same group of expatriates on three occasions during the international career cycle (prior to their departure on the international assignment, six months into their assignments, and on their repatriation), the time series longitudinal design was selected as the appropriate approach to be utilised in this study.

8.4. Research sample

8.4.1. Sampling process utilised

The subjects included in the experimental group were all pre-selected by their prospective employers as suitable individuals to be sent on international assignments. Similarly, the individuals included in the control group were drawn from applicants who were referred to the researcher by domestic companies in South Africa for assessment on a traditional assessment centre for possible appointment or promotion into managerial positions.

Taking into account the above mentioned limitations, it was not possible to make use of probability sampling during this study in assigning the individuals to either the experimental group or the control group. It was decided to make use of the Purposive or Judgmental Sampling technique (Baker, 1988: 157) as an appropriate non-probability sampling method. This form of sampling generally considers the most common characteristics of the population it wishes to sample, then attempts to determine where such individuals can be found, and then conducts research on the chosen sample.

Two general approaches or techniques exist for selecting samples: probability methods and non-probability techniques (Frandsberg & Kjellman, 2005: 27). The choice of sampling technique to be utilised in a research project depends on the feasibility and sensibility of the collected data to address the research objectives from the entire population.

Probability sampling methods are those in which every item in the population has a known chance of being chosen for the sample. This implies that the selection of sample items is independent of the researcher, and that the sampling process is controlled objectively to ensure that the items are chosen at random (Porkess, 2004: 219).

Non-probability sampling methods are those which do not provide every item in the universe with a known chance of being included in the sample. In the case of the non-probability sampling methods, the selection process is subjective, and is influenced by judgements made by the researcher (Frandsberg & Kjellman, 2005: 27).

8.4.2. Description of sample

In total, 84 individuals were included in the experimental group, and 42 in the control group. Table 8.1 provides a layout of the number of individuals included in the experimental and control groups utilised during this research.

Table 8.1.: Experimental versus control group

Category	Frequency	Percentage	Cumulative Percentage
Experimental group	84	66.7	66.7
Control group	42	33.3	100
Total	126	100	100

The subjects included in the experimental group consisted of expatriates that were sent on international assignments in foreign countries. Most of the individuals included in the experimental group were employed on a contractual basis, which means that no employment was guaranteed to them on completion of their contracts. Prior to their initial departure on the foreign assignment, most of them signed an agreement with their company that they would be employed on a contractual basis in the foreign country for a specified period of time. The contract does not stipulate any guarantee of employment on the person's return to South Africa. Consequently, these individuals returning to South Africa were officially unemployed on their return, and therefore needed to search for new employment in South Africa or as expatriates in other countries.



The control group consisted of individuals who were identified as potential candidates for possible appointment or promotion into managerial positions in domestic companies in South Africa. The individuals were referred to the researcher as candidates that needed to be evaluated for their leadership and management competence as assessed on a traditional assessment centre. The individuals included in the control group had never been on international assignments before, and did not indicate any indication of going on an assignment in the foreseeable future.

A possible concern that may be highlighted would be the size of both the experimental and the control groups included in this research. In this regard, Comrey (1988: 759) indicates that a sample size of 200 is reasonably acceptable when factor-analyses are conducted involving 40 or fewer variables. In this study, a total number of 33 variables were included. As discussed by Neuman (2000), one of the difficulties associated with making use of the panel study as the chosen approach in conducting a longitudinal study is that it may not always be practically possible to locate individuals included in the initial assessment during later assessments. This restriction also had an impact on the extent to which it was possible to obtain the appropriate follow-up data at the appropriate times from the individuals included in the experimental group, especially taking into account the distances and practical problems associated with gathering the appropriate data.

Similarly, it was not always practically possible to remain in contact at the exact times with the individuals included in the control group, as the period that was allocated between the first initial assessment and the last assessment corresponding with the repatriation of the expatriate varied between periods of 18 months to three years.

In order to obtain accurate results on the reliability and construct validity of the measuring instruments included in this study, it was decided to increase the number of subjects included in the initial pre-departure assessment to a total number of 308. This was done by adding the results of other individuals from the same companies who were assessed and counselled under very similar circumstances on the measuring instruments prior to their departure on their international assignments. Had the results of these additional people been available after exactly six months into their assignments and on their repatriation, these individuals would also have been included in the sample.

The results of the additional subjects included in the sample for the purposes of determining the reliability and construct validity of the measuring instruments were excluded from the remainder of the statistical analyses conducted during this study.

A breakdown and comparison follows of the experimental and control groups based on their biographical information.

8.4.2.1. Age

Table 8.2 below provides a layout of the age distribution of the subjects included in the experimental and control groups.

Table 8.2.: Age distribution

Age Category	Frequency	%	Cumulative Percentage	Frequency	%	Cumulative Percentage
	Experimental group			Control group		
25 – 29	8	9.5	9.5	5	11.9	11.9
30 – 34	22	26.2	35.7	7	16.7	28.6
35 – 39	24	28.6	64.3	15	35.7	64.3
40 – 44	14	16.7	81	8	19	83.3
45 – 49	12	14.2	95.2	4	9.5	92.8
50 – 54	3	3.6	98.8	1	2.4	95.2
55 – 59	0	0	0	2	4.8	100
60 – 64	1	1.2	100	0	0	100
Average age	37.5			37.9		
Total	84	100	100	42	100	100

The results included in Table 8.2 indicate that the average age of the individuals included in the experimental group (37.5) and the control group (37.9) are very similar. The average age obtained for the experimental group is very similar to the average age of 37.3 found for expatriates included in international research articles (Anderzen and Arnetz, 1999).

Of interest in this regard would be the findings of a survey conducted with multinational companies by Runzheimer (2000), which indicated that the age of expatriates being sent on international assignments may tend to decrease towards an average of 35.

8.4.2.2. Gender

Table 8.3 below provides the distribution of the expatriates based on gender. As can be seen, the vast majority of subjects included in both the experimental group (86.9 percent) and the control group (83.3 percent) are male. Only 13.1 percent of the subjects included in the experimental group are females, and 16.7 percent in the control group. This distribution is a clear indication that females are very much underrepresented in their appointment in both expatriate and in domestic management positions.

Table 8.3.: Gender distribution

Gender Category	Frequency	%	Cumulative Percentage	Frequency	%	Cumulative Percentage
	Experimental group			Control group		
Male	73	86.9	86.9	35	83.3	83.3
Female	11	13.1	100	7	16.7	100
Total	84	100	100	42	100	100

The distribution of male versus female subjects included in the experimental group seems to be very much in line with the distribution found in other expatriate studies, which also indicate that the vast majority of expatriates are male. In a South African study conducted by Van der Bank and Rothman (2002), the ratio between male and female expatriates was 93 to 7.



From an international perspective, Brotchi and Engvig (2006) indicate that 11 percent of expatriates sent on international assignments are female. Similarly, Schumacher (2000) calculates that 13 percent of all expatriates are female. Van Oudenhoven et al (2002) included 5 percent females in their sample of expatriates. In their commentary on the small number of females included in their sample, Van Oudenhoven et al indicate that female expatriate employees are still quite rare. As a result, role models for women being sent on international assignments are almost absent.

Results obtained from earlier publications indicate the following distribution of female expatriates: Caligiuri and Tung (as cited in Beaverstock, 2001) report that, "until the late 1980s, only 5 per cent of all American expatriates, 1 per cent of Japanese expatriates and 9 per cent of Finnish expatriates were women." Florkowski and Fogel (as cited in Guthrie & Ash, 2001) in 1995 found that 11 per cent of the expatriates included in their samples were female. In a study conducted by Tung (as cited in Guthrie & Ash, 2001), 13.9 percent of the assignees were female. Similarly, 14 per cent was reported by Tyler in 1999 (as cited in Guthrie and Ash, 2001).

If the results of recent studies are compared to earlier research, it becomes evident that the situation relating to the female representation among expatriates has not changed significantly. These results indicate that women are still very much underrepresented in global assignments. Tung (2004) identifies the following possible beliefs that may lead to companies limiting the opportunities for females to be considered for international assignments:

- The first possibility is that women may not be as interested in international assignments compared to males. Tung (2004) dismisses this possibility, referring to studies of students graduating with Masters Degrees in Business Administration at well-known management schools in the USA, Canada and Europe, where no gender-based differences could be identified in the interest shown by the two groups in their consideration of international assignments.



- A further possibility is that foreigners' preconceived ideas towards women may lead to them not being as effective as expatriates. Tung shows strong disagreement with this idea, highlighting a study of 160 male and female expatriates from North America showing that women are equally as successful as men in culturally tough environments, including countries where there is low participation of women in the workforce and/ or professional/managerial ranks. Tung makes a strong argument that women appear to possess certain attributes that may render them particularly suited to succeed in culturally tough international assignments.
- The belief may exist that women lack the mental ability and resilience to cope with the stresses and strains associated with living and working in some tough foreign environments. Tung (2004) dismisses this possibility as well, indicating that women may often be better suited for international assignments than men. Guthrie and Ash (2001) agree with Tung in this regard, indicating that gender-based differences in characteristics and natural ability may actually lead to females performing better than their male counterparts in dealing with the demands placed on them while on international assignments.
- Another factor which may have an impact would be the resistance shown by companies towards females as expatriates. Companies may show reluctance towards sending women on assignment. Guthrie and Ash (2001) indicate that companies often express the concern that women may experience more difficulty in being successful as expatriates compared to their male counterparts. As a result, these companies tend to be cautious of selecting women for international assignments.

Despite the fact that several studies have proven the above mentioned beliefs relating to female expatriates to be myths, Tung (2004) highlights a recent survey of 128 managers from the United States of America who are responsible for selecting candidates for international assignments. This survey found that the misperceptions towards female expatriates continued to persist. A further survey mentioned by Tung (2004) investigated the attitudes of women expatriates and their supervisors. The survey indicated a consistent discrepancy between male supervisors and female expatriates about their company's willingness to send women on international assignments, while none existed between the female supervisors and their female subordinates.

Commenting on the above mentioned statistics, Brotchi and Engwig (2006) assert that a "glass ceiling appears to persist" that blocks the international career opportunities available to females. Guthrie and Ash (2001) make a final comment in this regard, indicating: "... in a ferociously competitive global economy, no company can afford to waste valuable brainpower simply because it's wearing a skirt".

8.4.2.3. Race

Table 8.4 indicates the distribution of the subjects included in the sample based on their racial origin.

Table 8.4.: Race distribution

Race Category	Frequency	%	Cumulative Percentage	Frequency	%	Cumulative Percentage
	Experimental group			Control group		
White	63	75	75	25	59.5	59.5
Black	9	10.7	85.7	10	23.8	83.3
Indian	10	11.9	97.6	6	14.3	97.6
Coloured	2	2.4	100	1	2.4	100
Total	84	100	100	42	100	100

Of interest in Table 8.4 would be the significantly larger number of whites included in the experimental group (75 percent) versus the 59.5 percent included in the control group. Also of interest would be the significantly smaller number of blacks included in the experimental group (10.7 percent) compared to the control group (23.8 percent). The differences between the two groups could potentially be explained by current developments in the employment market in South Africa. It is the experience of the researcher that the white South African males often view international assignments as an alternative career opportunity. As a result of black empowerment currently being one of the focus areas in South Africa, a number of white males are placed in the difficult position of being retrenched to make way for the appointment of previously disadvantaged individuals. These white males then often cannot find alternative employment in South Africa, and are often forced to consider other opportunities outside South Africa, despite the turmoil and adjustment issues associated with leaving one's family and support structures at home.

On the other hand, it is also the experience of the researcher that appropriately qualified and experienced blacks are currently in a position of having more readily available career opportunities in South Africa. As a result, they may tend to be of the opinion that accepting an international assignment may deprive them of the opportunities available to them within the domestic South African employment market.

8.4.2.4. Company employed

In Table 8.5 is indicated a distribution of the subjects included in the experimental group based on their company of employment.

Table 8.5.: Companies included in experimental group

Company	Frequency	Percentage	Cumulative Percentage
Company 1	60	71.4	71.4
Company 2	20	23.8	95.2
Company 3	4	4.8	100
Total	84	100	100

Companies 1 and 2 included in the experimental group are both multinational companies in the telecommunications industry. This means that 95.2 percent of the subjects included in this experimental group are exposed to the unique demands associated with the telecommunications industry. During the past few years the telecommunications industry has been characterised by a fast growing and competitive market environment, which implies that people employed in this industry are required to be highly flexible, creative, and able to adjust to quickly changing circumstances.

The majority of the subjects included in the sample (71.4 percent) originated from one company in South Africa. A possible concern in this regard may be that the culture and expatriate policies in place in this particular company may have had an impact on the results obtained from the study, taking into account the significant number of subjects included in the sample that originated from this particular company.

Only four subjects included in the sample were from a company in the banking industry. The company's main source of revenue is situated in South Africa, and has a few relatively small subsidiaries in Europe. Traditionally, the banking sector was characterised by a more formal, structured, predictable environment. However, this has changed drastically during the recent few years, to the extent that the researcher found the pressures and demands being placed on the employees in the banking and telecommunications industries to be very similar.

Table 8.6.: Companies included in control group

Company	Frequency	Percentage	Cumulative Percentage
Company 4	24	57	57
Company 5	18	43	100
Total	42	100	100

The subjects included in the control group originate from two companies in the retail industry in South Africa. The subjects are quite well distributed in their representation of their respective companies. 57 percent of the subjects were employed with Company 4, and 43 percent of them with Company 5.

8.4.2.5. Host countries

Table 8.6 provides an indication of the host countries the expatriates were sent to during their international assignments.

Table 8.7.: Distribution of host countries

Host Country	Frequency	Percentage	Cumulative Percentage
Nigeria	39	46.4	46.4
Uganda	15	17.8	64.2
Tanzania	5	6	70.2
Democratic Republic of the Congo	5	6	76.2
Cameroon	10	11.9	88.1
Mozambique	6	7.1	95.2
Country in Europe	4	4.8	100
Total	84	100	100

The vast majority of the expatriates (95.2 percent) were sent to other African countries outside of South Africa. A significant number of the expatriates were sent specifically to Nigeria (46.4 percent). The strong presence of expatriates in Nigeria is not surprising, taking into account the recent expansion and growth of Nigeria as a market for international companies seeking business opportunities in Africa.

Nigeria has built up a very negative image across the world as a result of the extremely high prevalence of poor management, fraud, and corruption in the country. The Transparency International Corruption Perception Index (as cited in Shelley, 2004: 30) indicates that Nigeria was listed in 2003 as the 132nd most corrupt country out of a possible 133 countries included in the survey.

However, Nigeria also offers substantial business opportunities for international companies who are able and willing to manage the risks involved. The Gross Domestic Product (GDP) of Nigeria in 2002 was 43.5 billion US dollar, which makes it by far the largest economy and potential market in sub-Saharan Africa (excluding South Africa with a Gross Domestic Product of 104.235 billion US dollar in 2002). In comparison, the second largest sub-Saharan economy is Kenya with a Gross Domestic Product of 12.1 billion US dollar. With a population of 130 million, Nigeria also has by far the largest population in sub-Saharan Africa. Ethiopia has the second largest population with 66 million people (World Bank as cited in Shelley, 2004: 28). In the words of Shelley (2004: 180): *“The challenges you will face while doing business in Nigeria are immense, but so are the rewards. It is the biggest sub-Saharan market (excluding South Africa). If you can get in it now, you’ll be ahead of the game”*.

The remainder of the subjects included in the experimental group are distributed relatively equally across five other African countries, namely Uganda, Tanzania, Democratic Republic of the Congo, Cameroon, and Mozambique. Of interest in this regard would be that four of these five countries (with the exception of Cameroon) are mentioned by Shelley (2004) as countries with high potential for international business opportunities on one or more of the following criteria: Gross Domestic Product, population, Gross Domestic Product per capita, and economic growth rate.

Only four (4.8 percent) of the subjects included in the sample were sent to a non-African country in Europe (in order to protect the identity of the company involved, it was decided to exclude the name of the specific country). In this regard, the ideal would have been to compare the results obtained from the people sent to the country in Europe with the rest of the subjects sent to Africa. However, taking into account the very small sample of subjects sent to the European country, the results would not have been accurate and reliable. As a result, it would not have been feasible to generalise the results obtained to the larger population of expatriates being sent from South Africa to European countries.

8.4.2.6. Job levels

From Table 8.8 it becomes evident that the breakdown of the job levels included in the experimental and control groups are very similar. The number of managers and senior managers included in the experimental group seemed to be the significant majority, while the distribution of subjects included in the control group seemed to be slightly more equally spread among senior managers, managers, and engineers. The comparative spread of senior managers, managers, and engineers included in the experimental group (75 percent) and the control group (81 percent) also seem to be very similarly distributed.

Table 8.8.: Distribution of job levels

Job level Category	Frequency	%	Cumulative Percentage	Frequency	%	Cumulative Percentage
	Experimental group			Control group		
Senior management	25	29.8	29.8	11	26.2	26.2
Management	32	38.1	67.9	11	26.2	52.4
Engineer	6	7.1	75	12	28.6	81
Technician	2	2.4	77.4	8	19	100
Support staff	19	22.6	100	0	0	100
Total	84	100	100	42	100	100

As can be expected during a competence assessment, support staff would typically not be included in a traditional assessment centre, as their positions would not require a very high level of managerial competence. It is therefore not surprising to note that no support staff was included in the control group.

The distribution of job levels included in the experimental group seems to be very similar to the typical distribution of expatriate positions in general across the world as highlighted by international research. In this regard, a survey conducted by Runzheimer (2000) indicated that the most common job classifications for expatriates are executive management (65 percent), sales/marketing (57 percent), engineer/scientist (44 percent), and technician/programmer (23 percent).

8.4.2.7. Representation from different departments

The representation from different departments can be viewed in Table 8.9.

Table 8.9.: Distribution per department

Department Category	Frequency	%	Cumulative Percentage	Frequency	%	Cumulative Percentage
	Experimental group			Control group		
Networks/Production	22	26.2	26.2	9	21.4	21.4
Sales/Distribution	37	44	70.2	21	50	71.4
Finance	14	16.7	86.9	10	23.8	95.2
Human Resources	2	2.4	89.3	2	4.8	100
Information Systems	2	2.4	91.7	0	0	100
Marketing	7	8.3	100	0	0	100
Total	84	100	100	42	100	100

The majority of the individuals in both the experimental group (44 percent) and the control group (50 percent) seem to be working in the Sales or Distribution departments, followed by the Networks or Production departments (26.2 percent and 21.4 percent respectively). Taking into account the strong focus on sales and achievement of financial targets in a highly mobile customer-orientated industry within which companies in both the telecommunication industry and the retail industry find themselves, it is not surprising to see Sales/Distribution being the best represented departments in both the groups.

8.4.2.8. Length of assignment

Table 8.10 provides the distribution of the subjects included in the experimental group in terms of the duration of their international assignments.

Table 8.10.: Distribution of assignment length

Assignment Length Category	Frequency	Percentage	Cumulative Percentage
18 months	22	26.2	26.2
2 years	36	42.8	69
3 years and longer	26	31	100
Total	84	100	100

The majority of the subjects included in the experimental group were sent on two year assignments (42.8 percent). This is in line with the outcomes of a survey conducted by Van Heerden and Wentzel (2002), which indicates that the average length of time spent by expatriates sent on international assignments by South African companies varies between two to three years. The results also reflect the legal approach taken by most African countries towards foreigners, who typically grant work permits to expatriates for a period of two years (Shelley, 2004: 42).

Dependent on the availability of the skills offered by the expatriates among the local nationals in the host country, work permits may be extended for a longer period of time. The skills required during the implementation of a telecommunications network tend to be highly specialised in nature. As a result, these skills are seldom available among the local nationals, and therefore use is mostly made of the specialised skills and knowledge offered by the expatriates. The tendency to extend contracts based on the unavailability of specialised skills is reflected in the 31 percent of assignments that lasted for three years and longer.

Of interest would be the significant number of assignments with a length of 18 months. The 18 month contracts normally apply to people in technical specialist positions who are tasked with very specific projects in building the new telecommunications network in the foreign country. On completion of the specific project, the individual's skills are not required anymore at the specific operations, and the person moves on to a new project (either in South Africa, or on another project in another country).

The trends observable in the length of assignments in this study correlate with international findings. Aoun et al (2006) predict that the expatriate function within multinational companies will develop from being a managerial role towards becoming much more strategically orientated in its focus on troubleshooting and project work. As a result of this, Aoun et al (2006) expect that expatriate assignments will become much shorter in duration. However, international managers will travel much more regularly, as they will be required to carry out short-term assignments, rotations and cross-national boundary commuting. Schumacher (2000) observes similar trends, indicating that 38 percent of current international assignments last two years or less, and only 23 percent last longer than three years.

8.4.2.9. Previous expatriate experience

As can be seen in Table 8.11, the vast majority of subjects included in the experimental group have never been on an international assignment before, and therefore have no previous expatriate experience. The reason for this may be that South African companies have only recently started exploring business opportunities outside of South Africa on a large scale as a result of serious restrictions inhibiting the opportunities for international growth until 1994. Therefore, it is not surprising that the majority of the individuals included in the sample do not have any previous international experience, especially taking into account their relatively young average age as indicated in Table 8.11.

Table 8.11.: Distribution of expatriate experience

Experience Category	Frequency	Percentage	Cumulative Percentage
No previous experience	61	72.6	72.6
1 year	5	6.0	78.6
2 years	15	17.8	96.4
3 years	0	0	96.4
4 years and longer	3	3.6	100
Total	84	100	100

Of interest would be the 15 subjects who have two years of international experience. On further investigation it became evident that these individuals were previously assigned to other subsidiaries with the same company in other African countries. In order to avoid unnecessary breach of local laws in the host country relating to two-year work permits, these individuals were, on completion of their two-year assignments in the specific African country, transferred to subsidiaries in other African countries where their skills were required.

Also noticeable in Table 8.11 would be the three subjects included in the experimental group who have four years or longer experience as expatriates. These individuals were identified as so-called “professional expatriates” who have decided to make a career of being sent on international assignments. They tend to be highly qualified and experienced in very specific areas of technical expertise, and tend to be utilised by international companies during the initial start-up phases of new operations to complete clearly defined projects of a specialist or technical nature.

8.4.2.10. Marital status at commencement of assignment

Table 8.12 provides a breakdown of the marital status of the subjects included in both the experimental and the control group.

Table 8.12.: Distribution of marital status

Marital Status	Frequency	Percentage	Cumulative Percentage	Frequency	Percentage	Cumulative Percentage
	Experimental group			Control group		
Married	58	69	69	24	57.1	57.1
Single	19	22.6	91.6	7	16.6	73.7
Engaged	3	3.6	95.2	1	2.4	76.1
Divorced	4	4.8	100	10	23.9	100
Total	84	100	100	42	100	100



Most of the individuals included in both the experimental group (69 percent) and in the control group (57.1 percent) were married at the time when their initial assessments were conducted prior to their departure on assignment. These results seem to be very similar to the findings of Brotchi and Engvig (2006) who indicated that 71 percent of expatriates are married. Similarly, Schumacher (2000) states that 69 percent of people sent on international assignments are married.

It is important to note that the data relating to marital status was obtained during the initial assessments conducted on both the experimental and the control group. In the case of the expatriates, the data gathering took place prior to their departure on their international assignments. Taking into account the average divorce rate of expatriates which is estimated at approximately 55 percent (Hawley, 1997), the strong possibility exists that the marital status of a significant number of the subjects included in the experimental group could have changed during the course of the period of study.

Despite the researcher's involvement in supporting a significant number of expatriates in dealing with issues in their personal lives, no official records could be kept on the change that took place from a marital perspective during the assignments (the researcher had no official involvement with the subjects included in the control group during the period of study). The reason for the lack of records would be that expatriates tend to be very sensitive and private on issues relating to their personal lives. It therefore quite often occurs that the news of an expatriate marriage breaking up only reaches the official channels in the companies a few months after the expatriates have already left the employment of the company on completion of their assignments.

In the opinion of the researcher, the phases during which expatriates experience most difficulty in dealing with issues in their personal lives, are during their initial arrival and settling down in the foreign country, and a few months after their repatriation back into South Africa as their original home country.

Of interest would be the findings of Gomez-Mejia and Balkin (as cited in Punnett, 2002) that only 33 percent of the expatriate spouses included in their study indicated that they wanted to accompany the expatriates on another international assignment. Punnett (2002) comments that these statistics are not surprising, taking into account the fact that the adjustment process in the host country tends to be highly frustrating and traumatic for expatriate spouses. The expatriate spouses are required to cope on their own without the familiar support of their family and friends. They are also required to adjust to a new country with a different language, culture, and social infrastructure.

8.4.2.11. Spouse or significant other party accompanying expatriate

Table 8.13 provides information on the distribution of individuals included in the experimental group whose spouses or significant others accompanied them while on assignment, versus those whose spouses or significant others remained behind in South Africa.

Table 8.13.: Distribution of spouses accompanying expatriates on assignment

Spouse accompanying	Frequency	Percentage	Cumulative Percentage
Yes	41	48.8	48.8
No	43	51.2	100
Total	84	100	100

Table 8.13 indicates a relatively equal spread of spouses (48.8 percent) accompanying the expatriates on assignment, versus 51.2 percent of the spouses who remained behind in South Africa.

The results obtained from this particular sample seem to be slightly lower than the average indicated in international research. Research conducted by Brotchi and Engvig (2006) indicates that 65 percent of spouses accompany expatriates on assignment, while Schumacher (2000) found that 77 percent of expatriates' spouses accompany them. Reasons mentioned by Schumacher (2000) why expatriates leave their families in the home country when going on international assignments are:



- The spouse’s career at home
- The remote location to where the expatriate is seconded
- The lack of suitable educational facilities for the children
- Expatriates are often sent to hazardous locations that are not conducive towards a normal family lifestyle.

Of interest in this regard would be the outcomes of a study conducted by Tung (as cited in Punnett, 2002) which indicated that expatriates whose spouses accompanied them on assignment were more likely to explore the host country culture and learn the local language than those whose spouses remained behind in the home country.

The researcher agrees with the findings of Tung in this regard. The researcher’s experience with expatriates whose spouses remain behind in the home country is that the expatriates tend to spend significantly more time at work after hours and during weekends compared to their colleagues whose spouses have accompanied them. The reason for this occurrence is that the single expatriate does not really have a good enough reason to return to an empty apartment where there is nobody home. As a result, the expatriate also does not really make any major attempts to explore the host country culture and other areas of interest.

8.4.2.12. Children accompanying parents on assignment

The number of expatriates whose children accompanied them while on assignment can be viewed in Table 8.14.

Table 8.14.: Distribution of children accompanying expatriates on assignment

Children accompanying	Frequency	Percentage	Cumulative Percentage
Yes	21	25	25
No	63	75	100
Total	84	100	100



The majority of expatriate children (75 percent) remained behind in South Africa while the expatriates were on assignment. This is viewed as a very high percentage of children remaining behind, especially taking into account statistics provided by Brotchi and Engvig (2006) who indicate that 73 percent of expatriate children accompany their parents while on assignment. Schumacher (2000) also indicates that 61 percent of married expatriates take their children with on assignment. Three potential reasons can be identified for the low number of children accompanying their parents on assignments in this sample:

Firstly, nearly 40 percent (38.6 percent) of the individuals included in the experimental group did not have any children at the time when they went on assignment.

A second factor to be considered would be the fact that a significant number of the individuals included in the experimental group were required to leave on assignment at very short notice due to operational pressures. While on assignment, they were also required to be very flexible in moving to either other distant locations within the host country, or to a totally different country at short notice. As a result of the unpredictability caused by these sudden changes, a significant number of the expatriates decided to leave their families behind in South Africa while on assignment.

Thirdly, a particular problem experienced by the children of South African expatriates who are sent on international assignments, is the fact that the children are normally placed in international schools in the host country. These international schools function according to the northern hemisphere school calendar which commences each year during August and ends in September the following year. On their repatriation to South Africa, these children are often required to either advance or repeat a grade due to the fact that the South African educational system functions according to the southern hemisphere school calendar that commences in January and ends in December. In order to avoid any disruption in the education of their children as a result of the different educational systems, a number of expatriates decided to place their children in the care of relatives or in boarding schools in South Africa.



According to Punnett (2002), scientific research focusing specifically on the adjustment of expatriate children in foreign countries is scarce. Punnett refers to studies conducted by Forster (1997) and Gaylord (1979), who found that expatriate children experience the expatriation process to be most stressful during the ages of 3 to 5 years, and 14 to 16 years. Children between the ages of 3 to 5 years often experience difficulty coping on an emotional level, while those aged 14 to 16 are more likely to experience symptoms of social frustration as a result of having to move to a foreign country. According to their parents, children experienced most difficulty either in adapting to the new schools or making friends four months after their arrival in the foreign country.

Similar trends were found for children who remain behind in the home country while their parents went on assignment. De Leon and McPartlin (as cited in Punnett, 2002) found that the majority of the children staying behind believed that their parents did not support them sufficiently from an emotional perspective.

Tung (as cited in Punnett, 2002) also provides relevant trends regarding family demographics and adjustment to the host country. Expatriates whose children accompany them in the host country tend to have a stronger desire to spend time at home compared expatriates whose children remained behind in the home country. They also tend to be more willing to interact with other expatriates on a social level. Expatriates with children are also more likely to explore the host country culture and language, by means of sightseeing and visiting museums. In his response to the trends identified by Tung, Punnett's (2002) asserts that the underlying reason for the expatriates' stronger interest in the host country may be a stronger desire to engage in activities that involve the entire family.

8.4.2.13. Summary

As was laid out in the above mentioned discussions, the biographical details obtained on the subjects included in the experimental and control groups are very similar. This similarity in the inherent characteristics of the two groups makes them suitable as comparative samples that can be utilised to validate any changes that may take place in the experimental group as postulated in the original hypotheses.



A strong similarity also seems to exist between the characteristics of the individuals included in the experimental group of this study, compared to the characteristics of expatriates in general as indicated by international research. This is viewed as a positive indication, as this close similarity between the subjects included in this sample and the average expatriate provides the opportunity for the results obtained from this study to be generalised towards the general expatriate population.

8.5. Scales of measurement

All the variables utilised in this study made use of ordinal scales of measurement. Porkess (2004: 177) defines an ordinal scale as a scale that ranks and classifies respondents according to some specific characteristic. The scale makes no attempt to measure the degree of favourability of the different rankings. As a result, the distances between the different rank positions may vary widely.

According to Boyd et al (1985: 319), the ordinal scale is the most widely used measuring scale utilised in the social sciences. The most common forms of ordinal variables are attitudinal items where the level of agreement with specific statements is assessed.

Specifically, the Likert scale was utilised as a rating scale in the questionnaires utilised in this study, where respondents were required to indicate the extent to which they agreed or disagreed with each of the statements. In the Likert scale, a numerical score is allocated to each degree of agreement. The respondent's total score is calculated by adding these scores from all the statements (Boyd et al, 1985: 332). Examples of questions included in the various questionnaires utilised in this study are the following:

Table 8.15.: Sense of Coherence Scale

In the past, when I had to do something which depended upon co-operation with others, I had the feeling that it:								
Surely would not get done	1	2	3	4	5	6	7	Surely would get done

(Antonovsky, 1993)

Table 8.16.: Hardiness Scale

I feel that it is impossible to change my spouse's mind about something.					
False	1	2	3	4	True

(Kobasa, 1982)

Table 8.17.: Sixteen Personality Factor Questionnaire

I like watching team games.		
a. Yes	b. Occasionally	c. No

(Prinsloo, 1996)

Table 8.18.: Organisational Climate Questionnaire

I require clarification regarding the main objectives of my job.				
Strongly disagree	Disagree	Uncertain	Agree	Strongly agree
1	2	3	4	5

(Kossuth, 1998)

Due to copyright restrictions, it was not possible to include the above mentioned questionnaires as appendices to this study.

8.6. Variables measured during research

For the purposes of this research project, the following variables were included to be investigated:

- Antonovsky's Sense of Coherence Scale (Antonovsky, 1993)
- Kobasa's Hardiness Scale (Kobasa, 1982)
- Cattell's Sixteen Personality Factor Questionnaire (Prinsloo, 1996)
- Organisational Climate Questionnaire (Kossuth, 1998).

According to Boyd et al (1988: 166), measurement is the central concern of all sciences. Without effective measurement, the goals of scientific research are unattainable. When conducting research in the social sciences, the researcher must make use of variation to make comparisons and to test hypotheses. In order to measure a particular phenomenon, specific variables need to be identified. Boyd et al (1988: 117) define “variable” as a term that is used to describe something that varies. Within the context of the social sciences, a more practical definition of the term is provided by Taylor (2006: 13), who defines a variable as any attribute that could vary from one person or situation to the next.

A more detailed discussion follows on each of the variables included in the research:

8.6.1. Sense of Coherence Scale

The first variable included in this study is sense of coherence. The Sense of Coherence Scale (also referred to as the Orientation to Life Questionnaire) was developed by Antonovsky (1993). Antonovsky developed the questionnaire based on the outcomes of 51 qualitative interviews held with people who were probed to talk about their lives. The interviewees were people who had been subjected to the severe trauma of being placed in concentration camps. However, they were still able to live relatively healthy lives after surviving the very difficult circumstances.

Three components are assessed on the Sense of Coherence Scale. These components are comprehensibility, manageability, and meaningfulness (Antonovsky, 1993).

- Comprehensibility measures “*the extent to which an individual perceives the stimuli that confront him or her from the internal and external environments as making cognitive sense, as information that is ordered, consistent, structured, and clear*”;
- Manageability provides an indication of “*the extent to which an individual perceives that resources at his or her disposal are adequate to meet the demands posed by the stimuli from the environment*”;
- Meaningfulness reflects “*the feeling that one has of being a participant in shaping one’s destiny*”. The construct explains the motivational element in life in that life has meaning emotionally and not only cognitively. Antonovsky considered the sense of meaningfulness to be the most important of the three factors (Antonovsky, 1993).



A more detailed discussion on each of the Sense of Coherence components was provided in Paragraph 7.5.1 of Chapter 7.

The Sense of Coherence Scale is a self-reporting instrument, and consists of 29 items rated on a seven-point scale (agreement to disagreement) to indicate the extent to which a respondent agrees or disagrees with the meaning of its items (Kossuth, 1998: 222). A score of 1 and 7 represent the outer limits of the continuum. A score of 4 is in the middle and suggests that both poles apply equally.

Antonovsky made the assumption that it is not possible for an individual to obtain an extremely high score on the Sense of Coherence scale. An extremely high score could be indicative of an underlying pathological problem, *“as a person who consistently perceives everything as being comprehensible and predictable may be poorly adapted to reality”* (Pott, 1998: 39).

The following questions are included in each of the Sense of Coherence components:

Comprehensibility	:	Questions 1, 3, 5, 10, 12, 15, 17, 19, 21, 24, 26.
Manageability	:	Questions 2, 6, 9, 13, 18, 20, 23, 25, 27, 29.
Meaningfulness	:	Questions 4, 7, 8, 11, 14, 16, 22, 28.

8.6.1.1. Validity of the Sense of Coherence Scale

The validity of an assessment instrument concerns the extent to which the instrument actually measures what it was intended to measure (Baker, 1988: 26; Boyd et al, 1985: 30). The most basic method of testing for validity is to examine whether the measurement instrument really measures the underlying concept (Baker, 1988: 119). Antonovsky (1993) assessed the content validity of the Sense of Coherence Scale by making use of the facet design as a basis for questionnaire construction. After establishing the questions to be included in the questionnaire, Antonovsky involved three colleagues familiar with the theory to evaluate each item for its appropriateness. They each recorded a facet profile, ensuring that the 29 items indeed covered the three important components that comprise the sense of meaning construct.

Construct validity refers to whether or not an assessment instrument measures what it claims to measure (Pott, 1998: 39). In order to test the construct validity of the instrument, it is compared with instruments measuring similar constructs. A strong correlation between the two concepts confirms the similarity between them, and therefore confirms the validity of the construct. However, caution needs to be taken in the case where the correlations between the two concepts are too high, which may indicate that the construct lacks independence (Pott, 1998: 39).

The construct validity of the Sense of Coherence was determined by correlating it with other similar constructs. Kossuth (1998: 225) refers to a study conducted by Rumbaut who administered his 22-item sense of coherence scale and Antonovsky's 29-item questionnaire to 336 undergraduates. The correlation between the two scales was 0.64, which Antonovsky suggests "is a more respectable indication that the two scales are measuring a similar construct".

Pott (1998) also reports very high correlations between sense of coherence and the constructs of anxiety and depression. Specifically, the Sense of Coherence Scale correlated negatively with the State-Trait Anxiety Inventory-Trait and the Beck Depression Inventory (Van der Bank & Rothmann, 2002; Pott, 1998).

Kossuth (1998: 225) found a correlation of 0.50 between sense of coherence and hardiness, the other measurement of emotional health included in this study. This confirms Antonovsky's assertion (as discussed in Chapter 7), that the hardiness concept has a close relationship with sense of coherence.

The above mentioned studies indicate that Antonovsky's Sense of Coherence Scale is a valid measurement instrument in determining the sense of coherence construct.

8.6.1.2. Reliability of the Sense of Coherence Scale

Baker (1988: 123) defines reliability as the extent to which the measuring instrument produces similar outcomes when it is repeated. A more comprehensive definition for the term is provided by Taylor (2006): "*Whether the measurement would lead to sufficiently consistent outcomes, were it to be repeated, that one could have some confidence in the results*".

Two general procedures can be utilised to determine the reliability of an assessment instrument: measuring for equivalence (also referred to as internal consistency), and measuring for stability (also referred to as test-retest reliability) (Baker, 1988: 124).

The measurement used to measure the internal consistency of an instrument is referred to as the Cronbach's alpha. Antonovsky (1993) reports that the Cronbach's alpha measurement of internal consistency obtained for the Sense of Coherence Scale varied between 0.83 to 0.95. These high reliability coefficients were achieved amongst a variety of populations and for different languages and cultures. In the research conducted by Kossuth (1998: 264), he found a Cronbach's alpha of 0.85 for the Sense of Coherence Scale.

The test-retest reliability of the Sense of Coherence Scale was investigated by a study conducted among Israeli retirees in a kibbutz, where a test-retest correlation 0.54 was found after a period of one year (Pott, 1998). A similar study conducted amongst Israeli medical students by Carmel and Bernstein (as cited in Kossuth, 1998: 224) revealed test-retest correlations of 0.76 after an interval of one year. From a South African perspective, Wissing et al (1992) reported a test re-test reliability score of 0.97 after five weeks.

The above mentioned results indicate that Antonovsky's Sense of Coherence Scale is a reliable measurement of sense of coherence, both from an internal consistency and a test-retest reliability perspective.

8.6.2. Hardiness

The construct of hardiness was assessed by making use of the third version of the Hardiness Scale as developed by Kobasa (Harrison et al, 2002). The Hardiness Scale assesses three sub-scales:

- Control versus Powerlessness: The extent to which an individual's circumstances are seen to be related to his own activities, planning and effort, rather than to chance or unfair advantage;

- Commitment versus Alienation: The extent to which life and work are seen to be meaningful, interesting and worth committing to;
- Challenge versus Threat: The extent to which change, uncertainty, new ideas and new expectations are seen to be challenging rather than threatening.

A more detailed discussion on each of the above mentioned dimensions was provided in Paragraph 7.6.1 in Chapter 7.

The Hardiness Scale contains 50 items; each rated on a 4-point scale (from 1 ‘not true’ to 4 ‘completely true’). Global and sub-scale scores are calculated from the three subscales of commitment (16 items), control (17 items), and challenge (17 items).

8.6.2.1. Validity of the Hardiness Scale

In order to determine the construct validity of the Hardiness Scale utilised in this study, it was correlated with the longer seventy-six item Hardiness Scale developed by Bartone. A correlation of 0.93 was obtained between the two instruments (Gonella, 1999).

Certain concerns have been raised regarding independence of the three sub-dimensions included in the Hardiness Scale. In a study conducted by Funk and Houston on male college students (as cited in Bissonette, 1999), they were not able to obtain the exact three hardiness dimensions of control, challenge and commitment as established by Kobasa. Based on the outcomes of their research, Funk and Houston argue that hardiness provides a reflection of general emotional adjustment, a construct that can be measured more accurately by asking questions about depression. Despite these concerns, Bissonette (1999) maintains that the hardiness concept should still be utilised as a composite score. Moran (2002) agrees with Bissonette in this regard, asserting that the concept of hardiness “*deserves further investigation to determine if it can provide a meaningful input in assisting to predict effective coping and subsequent good health*”.

8.6.2.2. Reliability of the Hardiness Scale

Kobasa (as cited in Harrisson et al, 2002) reports an overall Cronbach's alpha coefficient of 0.90 for internal consistency, with an average alpha of 0.70 for commitment, control, and challenge. Subsequent research conducted by Harrisson et al (2002) confirms Kobasa's findings that the internal consistency of the Hardiness Scale is adequate. They measured an overall alpha coefficient of 0.85 for the instrument. Cronbach's alpha coefficients for the three subscales included in the Hardiness Scale were as follows: Commitment - 0.64; Control - 0.70; Challenge - 0.70.

The above mentioned results indicate that the Hardiness Scale utilised in this study is reliable as a measurement of the hardiness construct.

8.6.3. Global five factor model of personality

The global five factor model of personality as derived by Cattell (Institute for Personality and Ability Testing, 2007) from the Sixteen Personality Factor Questionnaire (16PF) was utilised in this study to obtain an accurate and scientific indication of the personality traits of the individuals that were sent on international assignments during this study.

The personality factors included in Cattell's global five personality factor model are the following:

- Extraversion
- Anxiety proneness
- Openness
- Independence
- Self-control.



The reasoning behind including the global five factors of personality as a measurement into the study was to determine the influence personality traits have as moderators or mediators on the way in which the expatriates view their adjustment to the external work environment during the various phases of the international assignment. Harrisson et al (2002) define a mediator as a *“qualitative or quantitative variable which represents the generative mechanism through which the focal independent variable is able to influence the dependent variable of interest, and which might explain how certain external events take on psychological significance”*.

The Sixteen Personality Factor Questionnaire (16PF) was originally developed by Dr. Raymond Cattell. Cattell made use of factor analysis to identify the underlying characteristics that lead to human behaviour. The 16PF scales provide an indication of temperament, which Cattell defines as *“a person’s characteristic style of thinking, perceiving, and acting over a relatively long period of time and in a wide range of different situations. These personality traits are manifested in a set of attitudes, preferences, social and emotional reactions, and habits”* (Institute for Personality and Ability Testing, 2007).

The Sixteen Personality Factor Questionnaire in its various forms is one of the most widely used personality assessment instruments in the world (Institute for Personality and Ability Testing, 2007). Extensive research has already been conducted on the validity and reliability of the instrument. Internationally, the 16PF is available in several different forms: the 16PF Fifth Edition (16PF-5), the Fourth Edition (16PF-4), and the original Forms A and B. The latest and most updated version of the instrument is the 16PF-5 (Van Rooyen, 2007).

The 16PF South African 1992 Version 92 as derived from the 16PPF-4 was utilised in this study (Prinsloo, 1996). The 16PF SA92 measures the following sixteen primary personality factors:

- Introvert versus Extrovert
- Unstable versus Stable
- Concrete versus Abstract
- Humble versus Assertive

- Serious versus Enthusiastic
- Undependable versus Conscientious
- Shy versus Adventurous
- Tough minded versus Sensitive
- Trusting versus Suspicious
- Practical versus Imaginative
- Unpretentious versus Shrewd
- Confident versus Apprehensive
- Conservative versus Liberal
- Group dependent versus Self-sufficient
- Uncontrolled versus Controlled
- Calm versus Tense

8.6.3.1. Global five personality factors

Herewith, a layout of the global five personality factors as established by Cattell (Institute for Personality and Ability Testing, 2007; Lord, 2000; Cattell et al, 1988). A detailed discussion on each of the five global factors and their underlying primary personality factors was provided in Paragraph 7.7.2 in Chapter 7.

i. Extraversion

The first global five personality factor identified by Cattell is referred to as Extraversion. Extraversion refers to the degree to which an individual enjoys being around other people, likes excitement and stimulation, and is cheerful by nature (Cattell et al, 1988: 117). Typical dimensions included in the Extraversion dimension would be being sociable, gregarious, assertive, etcetera. In addition to liking people and preferring large groups and gatherings, extraverts also tend to be assertive, active, and talkative.

In Table 8.19 a layout is provided of the primary 16PF personality factors included in the Extraversion factor, as well as the weighting attached to each of the primary factors in calculating the Extraversion factor:

Table 8.19: Primary factors included in Extraversion

Factor		Weight	Influence on Extraversion Domain
A	Extrovert	+0.3	Level of readiness to become involved with others
F	Enthusiastic	+0.3	Spontaneity of expression
H	Adventurous	+0.2	Level of ease in social situations
N	Shrewd	-0.3	Likelihood of disclosing personal information
Q2	Self-sufficient	-0.3	Strength of tendency to want to be around people and involved in group activities

(Lord, 2000: 62)

ii. Anxiety

Anxiety refers to a person's tendency towards experiencing neuroticism, anxiety, angry hostility, vulnerability, and to experience negative emotions in response to their environment (Cattell et al, 1988: 118).

The opposite of Anxiety proneness is Stability, which refers to a person's emotional stability, and the general tendency to experience negative emotions in response to their environment (Institute for Personality and Ability Testing, 2007). The primary 16PF personality factors included in the Anxiety factor, and the weighting attached to each of these factors in calculating the Anxiety factor, are indicated in Table 8.20 below:

Table 8.20: Primary 16PF factors included in Anxiety

	Factor	Weight	Manner of Influence on the Domain
C	Stable	-0.4	Perception of current level of coping with the daily demands of life
O	Apprehensive	+0.4	Level of self-criticism and apprehension
L	Suspicious	+0.3	Extent to which people are generally perceived as trustworthy and sincere
Q4	Tense	+0.4	Level of physical tension as expressed by irritability and impatience with others

(Lord, 2000: 62)

iii. Openness

The Openness construct refers to the extent to which the individual is willing to experience new or different things, and is curious about him- or herself and the world Cattell et al (1988). This dimension focuses on the person's preference for concrete realities and facts versus abstract ideas and possibilities.

Table 8.21 provides a layout of the primary 16PF personality factors included in the Openness factor, as well as the weighting attached to each factor in calculating the factor.

Table 8.21: Primary 16PF personality factors included in Openness

Factor		Weight	Manner of Influence on the Domain
A	Extrovert	+0.2	Extent to which warm involvement with others may influence judgement
M	Imaginative	+0.3	Balance between attending to the external environment and attending to the thought processes that are triggered by it
I	Sensitive	+0.5	Extent to which subjective feelings about issues influence judgement
Q1	Liberal	+0.5	Openness to new ideas and experiences

(Lord, 2000: 62)

iv. Independence

Independence refers to the extent to which an individual is able to effectively interact and get along with other people, and has compassion for others (Institute for Personality and Ability Testing, 2007). Typical dimensions included in the Independence dimension would be being persuasive, straightforward, wilful, etcetera. Independence incorporates the following 16PF primary factors:

Table 8.22.: Primary 16PF personality factors included in Independence

Factor		Weight	Manner of Influence on the Domain
E	Assertive	+0.6	Strength of tendency to attempt to exert influence over others
H	Adventurous	+0.3	Likelihood of feeling intimidated by people
L	Suspicious	+0.2	Likelihood of expecting people to have a hidden agenda
Q1	Liberal	+0.3	Openness to new ideas and new ways of doing things

(Lord, 2000: 62)

v. Self-control

Cattell also refers to the Self-control dimension as Conscientiousness. Self-control relates to the degree of effectiveness and efficiency with which a person plans, organises, and carries out tasks (Institute for Personality and Ability Testing, 2007). In Table 8.23 a layout is provided of the primary 16PF personality factors included in Self-control.

Table 8.23.: Primary 16PF personality factors included in Self-control

Factor		Weight	Manner of Influence on the Domain
F	Enthusiastic	-0.2	Control exerted over impulses to speak and act
G	Conscientious	+0.4	Degree to which societal demands of behaviour and externally imposed rules are valued and followed
M	Imaginative	-0.3	Control of attention
Q3	Control	+0.4	Importance attached to behaving in line with clearly defined personal standards and being organised

(Lord, 2000: 62)

8.6.3.2. Validity of the Sixteen Personality Factor Questionnaire

Validity refers to whether or not an assessment instrument measures what it claims to measure (Taylor, 2006). In order to test the construct validity of the instrument, it is compared with instruments measuring similar constructs. A strong correlation between the two concepts confirms the similarity between them, and therefore confirms the validity of the construct. In this regard, extensive research conducted on the five-factor models of personality as presented by Costa and McCrae (1992), and Goldberg (Institute for Personality and Ability Testing, 2007) indicated very similar structures to the global five personality factors of Cattell.

A summary of the three most commonly accepted five-factor personality models is provided in Table 8.24 below:

Table 8.24.: Summary of commonly accepted big-five personality factor models

Cattell	Goldberg	Costa and McCrae
1. Extraversion	1. Surgency	1. Extraversion
2. Anxiety proneness	2. Emotional stability	2. Neuroticism
3. Openness	3. Intellect	3. Openness
4. Independence	4. Agreeableness	4. Agreeableness
5. Self-control	5. Conscientiousness	5. Conscientiousness

(Institute for Personality and Ability Testing, 2007)

As can be seen in Table 8.24, a strong similarity exists among the three models, despite the differences observed in the names provided to the individual dimensions.

Based on the above mentioned discussions, the global five factor model of personality as derived by Cattell was found a valid measurement of the personality traits of the individuals that were sent on international assignments during this study.



The South African 1992 Version of the 16 Personality Factor Questionnaire (16PF-SA92) (Prinsloo, 1996) was utilised during this study as instrument to assess the global five factors of personality. Certain concerns may potentially be raised regarding the advisability of making use of an older version of the 16PF and its validity in assessing individuals from culturally diverse backgrounds in South Africa. The reason for making use of the 16PF-SA92 in this study is that the collection of data for the study had already commenced during 1997 when the first individuals included in the sample were expatriated to foreign countries. At that point in time, the 16PF-SA92 was still the most recently developed and the most commonly utilised version of the 16PF.

Karson et al (1997: 143) recommend that the latest 16PF-5 be utilised when conducting assessments on individuals. However, they also indicate that the 16PF-4 is still considered appropriate for assessment purposes until the 16PF-5 has been accepted by the general psychological testing community as the latest version of the 16PF to be utilised. The 16PF-SA92 is similar to the 16PF-4 utilised internationally, and was standardised for South African conditions (Prinsloo, 1996).

Table 8.25 presents the validity coefficients obtained for the 16PF-SA92 (Prinsloo, 1996).

Table 8.25.: Validity coefficients obtained for 16PF-SA92

A	B	C	E	F	G	H	I	L	M	N	O	Q1	Q2	Q3	Q4
0.79	0.35	0.70	0.63	0.83	0.67	0.92	0.70	0.49	0.44	0.41	0.71	0.62	0.70	0.68	0.57

(Prinsloo, 1996)

8.6.3.3. Reliability of the Sixteen Personality Factor Questionnaire

Reliability coefficients for the 16PF-SA92 as calculated by Prinsloo (1996) are presented in Table 8.26 below:

Table 8.26.: Reliability coefficients for 16PF-SA92

A	B	C	E	F	G	H	I	L	M	N	O	Q1	Q2	Q3	Q4
0.86	0.79	0.82	0.83	0.90	0.81	0.92	0.90	0.78	0.75	0.77	0.83	0.82	0.85	0.80	0.82

(Prinsloo, 1996)



As can be seen in Table 8.26, the Cronbach alpha coefficients of the personality traits vary from 0.75 (Factor M) to 0.92 (Factor H). Taking into account the suggestion by Nunnally (1978: 261) that a Cronbach alpha of between 0.5 and 0.6 is satisfactory for research purposes, the above mentioned coefficients are regarded as acceptable for the instrument to be included in this research.

8.6.4. Organisational Climate Questionnaire

Organisational climate refers to perceptions of organisational policies, practices, and procedures that are shared by individuals within organisations (Reichers & Schneider, 1990). Individuals are assumed to evaluate organisational attributes in terms of their own values and the significance of those attributes for their own well-being. These evaluations are termed “psychological climate” at the individual level. When these evaluations are shared by a sufficiently large number of people within a workplace, they are referred to as “organisational climate” (Neal et al, 2000).

The Organisational Climate Questionnaire utilised in this study was developed by Kossuth (1998). The instrument is used to measure the psychological climate in an organisation. There are certain measurable properties of climate which determine how individuals perceive this psychological atmosphere. It is the measurement of these properties which forms the basis for the development of the climate questionnaire in this research (Kossuth, 1998: 207).

The Organisational Climate Questionnaire was designed for the purpose of recording the perceptions of an individual with respect to the psychological atmosphere of the organisation. These perceptions influence the behaviour of the individual and have an effect on his performance. Therefore, the instrument is capable of measuring the properties of climate as a mechanism for determining and predicting behaviour and performance (Kossuth, 1998: 207). High scores on the items indicate that the perception of climate is positive, with the exception of items in job tension and propensity to leave where low scores are desirable.



The original Organisational Climate questionnaire developed by Kossuth (1998) consists of 16 dimensions of organisational climate, each dimension being measured by five statements or questions. Each individual responds to each statement or question in relation to how he perceives the situation. The questionnaire consists of 80 items. These are answered on a 5-point Likert type scale from very positive (definitely agree) = 5, to very negative (definitely disagree) = 1 (Kossuth, 1998: 207).

The dimensions included in the original Organisational Climate Questionnaire are the following (Kossuth, 1998: 208):

- Decision making: The extent to which decision making is effective and whether or not individuals can contribute to the decision making process;
- Job and organisational structure: The extent to which jobs are properly structured, organisational structures are clear and the formal authority is determined;
- Role clarity: The extent to which employees understand what is expected of them in their work;
- Standards: The extent to which employees feel that high standards are set and maintained in the organisation;
- Conflict handling: The extent to which individuals are encouraged to present their own ideas, and whether or not disagreements are confronted and worked through rather than avoided;
- Supervisory effectiveness: The extent to which supervisors manage their work properly in terms of delegation, providing feedback on performance, planning and co-ordinating the work of their subordinates, and giving them guidance and assistance;
- Communication: The extent to which employees are able to obtain the information necessary to do their jobs properly, as well as the extent to which both upward and downward communication exists in the workplace;



- Team building: The extent to which employees in the work teams assist each other and provide the necessary psychological support to assist colleagues in their work;
- Responsibility: The extent to which individuals are allowed to make decisions in their work without being constantly checked or hindered by red tape, as well as the extent to which initiative is encouraged in decision making;
- Reward: The extent to which the appropriate reward systems operate in the organisation;
- Satisfaction: The extent to which the individual enjoys his/her life and work, in that he is able to exercise his skills in the performance of his function;
- Job tension: The extent to which an individual worries about aspects of his/her work environment that impose on his time, family, situation or personal grievances. The extent to which these issues are not satisfactory resolved will reflect in job tension.
- Propensity to stay : The extent to which the individual is likely to want to stay with the organisation, as opposed to searching for alternative employment;
- Contribution to company profits: The extent to which individuals feel that they contribute meaningfully to the setting of department and organisation goals, and have some say in how these are to be achieved;
- Development of supervisory skills: The extent to which individuals feel and believe that they are receiving adequate management and supervisory skills training;
- Leadership: The extent to which individuals view the management team in the organisation as being competent, credible, and trustworthy.

8.6.4.1. Organisational Climate variables included in research

Based on the detailed literature study conducted in Chapters 4, 5 and 6 of this research, it was decided to select from the original 16 Organisational Climate factors those that are most applicable and relevant to the expatriate work environment. The results obtained from the initial analyses conducted in this research were also utilised as guidelines in selecting factors that were sufficiently reliable to be included in the research. As a result of the elimination process, the following six key factors were identified and included as organisational climate factors in the study:

- Role clarity
- Communication
- Leadership
- Satisfaction
- Tension
- Propensity to stay

A discussion follows on each of the factors included in the research, as well as the reasoning behind their inclusion in the study.

i. Role clarity

During his validation of the Organisational Climate Questionnaire, Kossuth (1998: 47) categorised the following factors together, referring to them as “*directive dimensions of climate*” that reflect the rules and norms of the organisation:

- Role clarity
- Structure
- Job standards
- Supervisory effectiveness



Kossuth (1998: 42) gives specific attention to role clarity as a key dimension that has a direct impact on the individual's perception of the climate in the organisation. According to Kossuth, the concept of role clarity can be operationalised in two ways.

Firstly, role clarity can refer to the presence or absence of adequate role relevant information. Kossuth (1998: 42) also refers to this concept as objective role clarity.

Secondly, role clarity or role ambiguity can also refer to the subjective feeling of having as much, or not as much, job-relevant information as the person would like to have during the conduct of his work (Kossuth, 1998: 42). Neal et al (2000) also specifically refer to the lack of role clarity as "role stress", and include it as part of four first order factors that directly impact on the climate of an organisation.

From an expatriate climate perspective, five sub-dimensions were referred to in Chapter 5 under the concept of role clarity as having a significant impact on the adjustment of the expatriate:

- Role clarity (ambiguity)
- Role discretion
- Role novelty
- Role conflict
- Role overload.

A detailed discussion on the impact of role clarity on the expatriate and his performance while on international assignment can be found in Paragraph 5.5.2 in Chapter 5 of this research.

Based on the above mentioned observations, it was decided to include role clarity in this research as a factor that has a significant impact on the adjustment of the expatriate while on international assignment.



ii. Communication

Communication is included by Kossuth (1998: 47) as a critical interactive dimension having an impact on the climate in the organisation. Interactive dimensions refer to those dimensions of organisational climate that comprise the social interactions between employees and other parties in their external environment (Kossuth, 1998: 38). Other dimensions included by Kossuth as interactive dimensions of climate are reward, team building, contribution to profits, and conflict handling.

From an expatriate perspective, communication was found one of the most important factors having an impact on the expatriate during all three phases of the international career cycle. Detailed discussions in this regard can be seen in Paragraph 5.5.3 in Chapter 5, and Paragraph 6.3.1.2 in Chapter 6 of this research.

Based on the above mentioned observations, it was decided to incorporate communication as a critical dimension as part of this research.

iii. Leadership

Leadership was also included as an Organisational Climate factor during this research. Kossuth (1998: 47) identifies leadership as a critical factor for determining the psychological atmosphere or climate of the organisation. Kossuth (1998: 48) refers to Blake and Mouton, who suggest that leadership style is a major determinant of behaviour in organisations. Solomon et al (2001) concur with the above mentioned authors, asserting that the leader in the organisation has a critical role to play in his role as agent, effecting employees directly or indirectly through the climate in the organisation.

These observations are in accordance with research conducted by Litwin and Stringer (as cited in Kossuth, 1998: 48), which indicates that the leader who is able to establish clear goals, provide sufficient support, set achievable objectives, provide good communication, and establish clear structures and standards is most likely to achieve the best results in establishing a so-called “achieving” organisational climate.



From an expatriate perspective, a detailed discussion was conducted in Paragraph 5.5.3 in Chapter 5 on the impact of leadership on the expatriate and his performance while on international assignment, with the specific reference to the impact of different leadership styles that exist at the head office in the home country, and the subsidiary in the host country.

iv. Satisfaction

Satisfaction was the fourth Organisational Climate factor included in this research. Kossuth (1998: 47) includes job satisfaction as a so-called “interactive dimension” that influences organisational climate. According to Kossuth (1998: 51), there is a direct relationship between satisfaction and work performance.

Of importance in this regard would be the assertion by Forehand and Gilmer (as cited in Kossuth, 1998) that satisfaction is an outcome variable influenced by environmental factors such as role clarity and the structure of the organisation, as well as personal variables such as attitudes and motives that the person brings with him into the work situation. Organisational climate can therefore be viewed as an interaction of environmental and personal variables that leads to satisfaction and work performance.

From an expatriate perspective, Yavas and Bodur (1999) indicate that satisfaction refers to three specific aspects: general job satisfaction, satisfaction with the expatriation process, as well as satisfaction with the personal aspects of expatriation. In their research, Yavas and Bodur (1999) found a direct relationship between the satisfaction experienced by expatriate managers, and their commitment towards their assignments and companies of employment. These results are confirmed by similar research conducted by Stahl et al (2002), who found that the levels of satisfaction experienced by the expatriate while on international assignment also provide some indication of the expatriate’s levels of commitment towards the company on their repatriation after completing their assignments. A detailed discussion on expatriate satisfaction as both an outcome and an influence on expatriate performance is provided in Paragraph 3.8.4 in Chapter 3, as well as in Paragraphs 5.4 and 5.5 in Chapter 5.



v. Tension

Kossuth (1998: 47) includes tension as both a directive and an interactive dimension in his Organisational Climate questionnaire. Kossuth defines tension as the extent to which the individual experiences tension concerning aspects of his work environment that impose on his time, family, situation or personal grievances.

From an expatriate perspective, tension is viewed from a broader perspective and incorporates the extent to which the individual experiences his personal, work, and social environment as being stressful. The purpose of this research is to determine the extent to which the expatriate is able to remain emotionally healthy, despite being faced with a multitude of external pressures and demands exerted on him from the external environment in the foreign country - both at a professional and a personal level.

A detailed discussion on the pressures being placed on the expatriate during the various phases of the international career cycle that lead to him experiencing significant levels of tension can be seen in Paragraph 3.8.4 in Chapter 3, Paragraph 5.4 in Chapter 5, and Paragraph 7.2 in Chapter 7.

Based on the above mentioned observations, it was decided to include tension as an organisational climate factor in this research.

vi. Propensity to stay

Kossuth (1998: 47) also includes propensity to stay as both a directive and an interactive dimension in his Organisational Climate questionnaire, and defines the concept as the extent to which the individual is likely to want to remain with the organisation, as opposed to searching for alternative employment.



Within the broader expatriate perspective, Van der Bank and Rothman (2002) refer to propensity to leave (the opposite of propensity to stay) as the individual's "desire to terminate his assignment". They describe desire to terminate the assignment as the most basic behavioural criterion for assessing the outcome of an expatriate assignment. The desire to terminate the assignment refers to an expatriate requesting to return to his home country before the assignment is completed. Detailed discussions on expatriates' desire to terminate their assignments early can be found in Paragraph 3.8 in Chapter 3, as well as Paragraphs 5.5.1 and 5.5.2 in Chapter 5.

Within the framework of the above mentioned observations, it was viewed of critical importance to include propensity to stay as an organisational climate factor in this research.

8.6.4.2. Validity of the Organisational Climate Questionnaire

Construct validity refers to whether or not an assessment instrument measures what it claims to measure (Taylor, 2006). In order to test the construct validity of the instrument, it is compared with instruments measuring similar constructs. Measurements of organisational climate dimensions included in this research correlate with other valid measurements of team building and supervisory support. Kossuth (1998) found an average correlation coefficient of 0.48 between organisational climate and teamwork, and 0.53 between organisational climate and supervisory support dimensions. These results confirm the construct validity of the Organisational Climate Questionnaire.

8.6.4.3. Reliability of the Organisational Climate Questionnaire

Kossuth (1998: 253) found the overall Cronbach alpha of the Organisation Climate Questionnaire to be 0.86. This indicates that the questionnaire is a reliable measuring instrument for the purposes of this research project.



8.7. Statistics to be utilised during study

8.7.1. Introduction

The following steps and statistical techniques will be utilised in order to achieve the objectives set in Chapter 1 of this research:

Firstly, the psychometric properties of each of the instruments included in the study will be investigated.

Secondly, descriptive statistics for the measurement instruments will be calculated and discussed.

Thirdly, the differences between means of variables as obtained by the experimental and control groups will be determined, as well as mean differences in variables over time.

Correlations existing among the variables included in the study will be investigated to obtain an indication of possible relationships.

Lastly, a discussion will be conducted on the results obtained from the regression analysis conducted to determine which aspects of organisational climate and personality predict emotional health.

Herewith, a more detailed discussion on the statistical analyses that will be conducted in this research:

8.7.2. Psychometric properties of assessment instruments

The reliability of the measurement instruments will be determined by making use of Cronbach's (1951) Alpha coefficient for internal consistency. An item analysis will also be conducted in order to determine the item-total correlation and the frequency distribution of responses on the measurement instruments.

In order to determine the factorial structure and therefore the validity of the measurement instruments, a maximum likelihood factor analysis with Promax rotation will be conducted (Taylor, 2006).



Inter-correlations among dimensions assessed in the various instruments will also be analysed by making use of Pearson's Product Moment Correlation Coefficient (r) in order to determine their interdependence (Neuman, 2000: 331).

8.7.3. Descriptive statistics for measurement instruments

Descriptive statistics will be calculated in order to describe, display, and arrange the numerical data (Porkess, 2004: 76). The following descriptive statistical measures will be utilised during this study:

- Means: the average score of all the scores included in the sample;
- Standard deviations to determine the spread or dispersion of the data;
- Skewness as an indication of the deviation of the distribution of responses from symmetry.
- Kurtosis to determine the sharpness of the peak of a distribution.

8.7.4. Comparison of mean scores

Objective 1 established during this research was to establish the impact of the expatriation process on the individual's emotional health. In order to achieve this objective, a postulate was set that the emotional health of the individual expatriate is directly and significantly influenced during the three phases of the international assignment.

In proving this postulate, the Sense of Coherence and Hardiness mean scores of the experimental and control groups before departure will be compared with their Sense of Coherence and Hardiness mean scores after six months on assignment. The Sense of Coherence and Hardiness mean score of the experimental and control groups after six months on assignment will also be compared with their Sense of Coherence and Hardiness mean scores after completion of their assignments.

Further comparisons will be made between the Sense of Coherence and Hardiness mean scores of the experimental and control groups before departure on international assignment. This comparative exercise will be repeated six months after arrival on the international assignment, as well as after their completion of their assignments. All of the mean comparisons will be done by using a General Linear Model procedure to perform a factorial ANOVA with one between subjects variable (experimental versus control group) and one within subjects variable (Before / During / After, or Before / During depending on the variables involved).

8.7.5. Correlation analysis

Correlation analysis will be utilised to achieve Objectives 2, 3, and 4 of this research. A discussion follows on the processes to be utilised:

8.7.5.1. Objective 2

The second objective of this study is to establish the relation that exists between the expatriate personality and the individual's emotional adjustment during the various phases of the expatriation process. In achieving this objective, the second postulate set is that a direct correlation exists between the individual's personality traits and the individual's emotional adjustment during the assignment.

In proving this postulate, correlations between the five global personality factors and the Sense of Coherence and Hardiness mean scores of the experimental group before departure and after six months of assignment will be investigated.

Correlations emerging between the primary 16PF personality factors and the Sense of Coherence and Hardiness mean score of the experimental group before departure and after six months of assignment will also be investigated.

The above mentioned analyses will be conducted by making use of Pearson's Product Moment Correlation Coefficient (r) (Neuman, 2000: 331).

An important factor that needs to be taken into consideration during the examination of inter-correlations would be the extent to which the inter-correlations are reliable (how probable it is that a similar relation would be found if the experiment was replicated with other samples drawn from the same population). This reliability is calculated by making use of a standard measure called the p -level or statistical significance level. The p -level represents the probability of error that is involved in accepting the observed result as valid, that is, as representative of the population. The p -level of a result is an estimated measure of the degree to which it is true in the sense of being representative of the population. The higher the p -level, the less the probability is that the observed relation between variables in the sample is a reliable indicator of the relation between the respective variables in the population (Statistica, 1994).

In areas of research, the p -level of 0.05 is considered as a "border-line acceptable" error level (Statistica, 1994). Results that are significant at the $p < 0.01$ level are commonly considered statistically significant, and $p < 0.005$ or $p < 0.001$ levels are often called "highly" significant (Kerlinger, 1986: 188).

8.7.5.2. Objective 3

The third objective of this study is to establish the impact of organisational climate factors on the emotional adjustment of the individual prior to departure on the international assignment, and after six months on assignment. In line with the above mentioned objective, the third postulate set in this research is that the organisational climate prior to and during the international assignment has a significant influence on the expatriate's levels of emotional health.

In proving this postulate, the correlations between the Climate variables and the Sense of Coherence and Hardiness mean score of the experimental group before departure on assignment will be investigated. A further investigation will be conducted to investigate the correlations between the Climate variables and the Sense of Coherence and Hardiness mean scores of the experimental group during assignment.

Pearson's Product Moment Correlation Coefficient (r) will be applied again during the above mentioned analyses.



8.7.5.3. Objective 4

Objective 4 set during this study was to establish the nature of the relationship that exists between expatriate personality and the individual's perception of the organisational climate. In line with this objective, it is postulated that a direct correlation exists between the individual's personality traits and the individual perception of the organisational climate prior to and during assignment.

The above mentioned postulate will be tested by investigating the correlations that exist between the five global personality factors and the climate variables of the experimental group before their departure on assignment and after being on assignment for six months.

An investigation will also be conducted on correlations emerging between the primary 16PF personality factors and the climate variables of the experimental group before their departure on assignment, as well as six months after arrival on their assignments.

As was the case during the previous investigations, Pearson's Product Moment Correlation Coefficient (r) will be utilised during the above mentioned analyses.

8.7.6. Regression analysis

The fifth objective of the study is to establish the main predictors of emotional health of expatriates. In order to achieve this postulate, a multiple regression analysis will be conducted where the impact of personality and climate factors on emotional health is determined.

8.8. Statistical programme utilised

The Statistical Analysis Software (SAS) and SPSS Version 15.0 statistical packages were used for the analysis of the data in this study.



8.9. Summary

In Chapter 8 the methodology utilised during the conduct of the empirical research in this study was highlighted. In line with the criteria established by Mouton (2001: 123), the following specific areas were discussed. The research hypotheses were defined and illuminated. The research design utilised in the study was described. The sampling process utilised during the study was clarified. The variables and measuring instruments utilised in this study were described. The statistical methods and procedures utilised at the various phases of the study were also specified.

The discussions conducted in Chapter 8 provide the basis for the results obtained from the empirical research. These results are investigated in Chapter 9.



Chapter 9

Results

9.1. Introduction

After applying the methodology and statistical procedures discussed in Chapter 8, the results obtained from the study are presented in Chapter 9. The results obtained from the statistical analyses are presented in the following sequence:

- The psychometric properties of each of the instruments included in the study;
- Descriptive statistics for the measurement instruments;
- Comparative analyses of the differences between means of variables as obtained by the experimental and control groups over time by making use of a General Linear Model procedure and an independent samples t-test;
- The possible relationships among the variables included in the study. Correlations calculated by making use of Pearson's Product Moment Correlation Coefficient (r);
- The results of the regression analysis conducted to determine which climate and personality variables are the main predictors of emotional health of expatriates.

9.2. Psychometric properties of measuring instruments

9.2.1. Introduction

In order to obtain more accurate results on the reliability and construct validity of the instruments included in this study, the number of participants included in the initial pre-departure assessment was increased from 126 (84 included in experimental group plus 42 included in control group) to a total number of 308 (185 included in experimental group and 123 included in control group). This was done by adding the data of other individuals who were assessed and counselled under similar circumstances as the sample on the measuring instruments prior to their departure on their assignments.

Unfortunately these individuals could not be included in the sample for the remainder of the calculations. In order to have been included in the sample, their follow-up data should have been available after six months on assignment, as well as on their return on completion of their assignments (refer to discussion of the sample and method of data gathering in Paragraph 8.4.2 in Chapter 8). Had results of these additional participants been available after six months into their assignments and on their repatriation, they would also have been included in the sample. These subjects included in the sample for the purposes of determining the reliability and construct validity of the measuring instruments were therefore not included in the remainder of the statistical analyses conducted during this study.

This section describes the psychometric properties of the measurement instruments included in this study. The reliability, factor structure, inter-scale correlations of the Sense of Coherence, Hardiness, and Organisational Climate questionnaires are presented below. The Sixteen Personality Factor Questionnaire could not be included in these analyses, as only sten scores were available. Individual raw scores were not available for the purposes of statistical analysis.

9.2.2. Sense of Coherence Scale

9.2.2.1. Reliability of the Sense of Coherence Scale

i. Internal consistency

The reliability of the Sense of Coherence Scale was determined by making use of Cronbach's Alpha coefficient for internal consistency (Clark & Watson, 1995; Cronbach, 1951). Nunnally (1978: 261) states that a Cronbach alpha of between 0.5 and 0.6 is satisfactory for research purposes. A summary of the Cronbach Alpha coefficients obtained for the Sense of Coherence Scale can be seen in Table 9.1.

Table 9.1.: Cronbach Alpha coefficients for Sense of Coherence dimensions

Dimension	Number of items	Cronbach Alpha
Overall Sense of Coherence	29	0.88
Comprehensibility	11	0.75
Manageability	10	0.71
Meaningfulness	8	0.74



As can be seen in Table 9.1, the Cronbach Alpha coefficients for the three Sense of Coherence factors were found to be satisfactory. These results are in line with the levels of reliability indicated for the Sense of Coherence Scale by Antonovsky (1993: 727) in his studies, which varied between 0.86 and 0.95.

From the above mentioned results it becomes evident that the overall Sense of Coherence score is a more reliable measurement of the sense of coherence construct (Cronbach Alpha = 0.88) compared to its underlying three dimensions.

ii. Item-total correlations

An item analysis was also conducted in order to determine the individual item-to-overall scale correlation and the frequency distribution of responses on the Sense of Coherence Scale. The table displaying the item analysis for the Sense of Coherence Scale is presented in Appendix A.

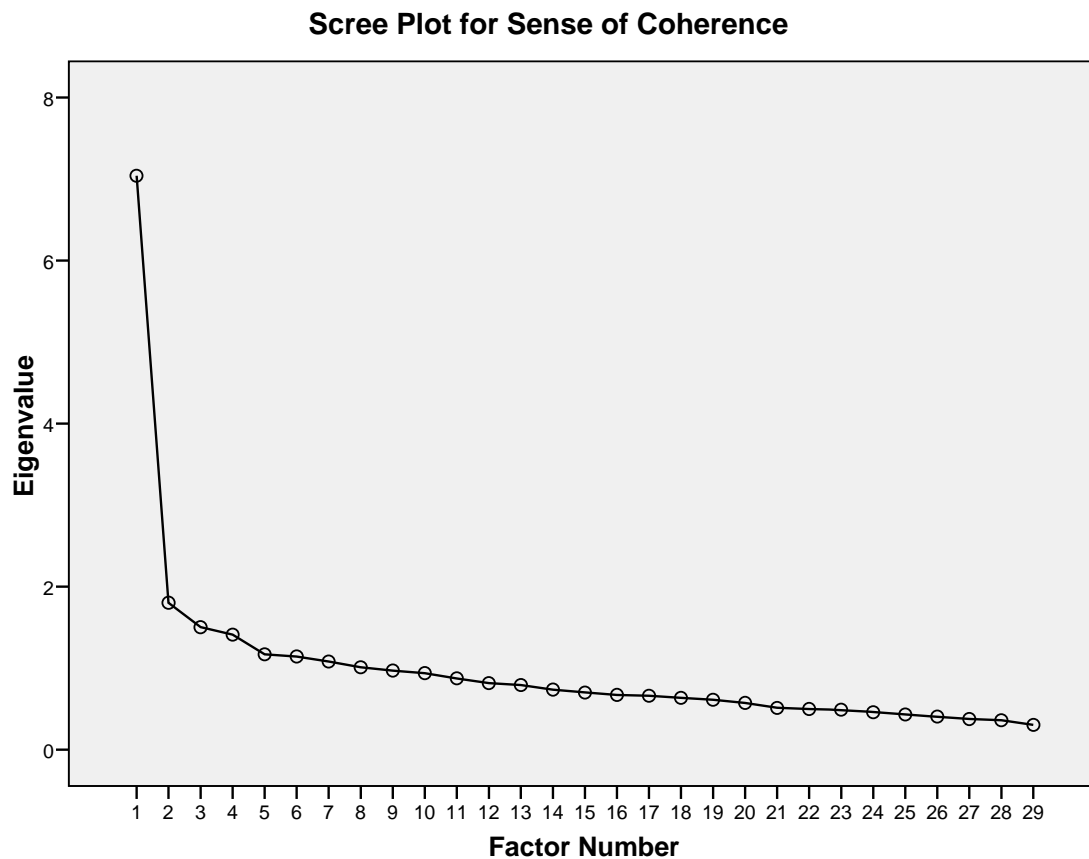
Clark and Watson (1995: 316) indicate that an individual item should have a correlation of between 0.15 and 0.5 with the overall scale in order to be considered a reliable and valid contributor to the assessment instrument. As can be seen in the table in Appendix A, the lowest item-scale correlation obtained for the Sense of Coherence scale during this study was 0.36 (Item 13). The highest item-scale correlation obtained in this study was for item 16, which indicated an item-scale correlation of 0.70. The average item-scale correlation obtained for the Sense of Coherence scale during the study was 0.55.

These correlations therefore indicate that most of the items included in the Sense of Coherence scale meet the requirements to be considered representative of the specific dimensions they are intended to assess. The reliability of the Sense of Coherence Scale was therefore found to be acceptable.

9.2.2.2. Factor structure of Sense of Coherence Scale

A maximum likelihood factor analysis with Promax rotation ($k = 4$) was conducted on the Sense of Coherence Scale items in order to determine the factorial structure of the questionnaire. The scree plot obtained is presented in Figure 9.1.

Figure 9.1.: Scree plot for Sense of Coherence Scale



During his validation of the Sense of Coherence Scale, Antonovsky (1979) identified three clearly definable sub-dimensions. In line with Antonovsky’s model, three factors were extracted in this factor analysis. These three factors accounted for 35.68 percent of the variance in the factor correlation matrix.

In Figure 9.1 the scree plot indicates the existence of three to four factors that explain most of the variance in the data. However, the scree plot also indicates evidence of a possible latent factor (Factor 1) that explains 24.28 percent of the variance in the data. Taking into account the strong presence of Factor 1, the inference can be made that a higher order factor is assessed in the Sense of Coherence Scale.

The factor pattern matrix for the Sense of Coherence Scale is presented in Table 9.2.

Table 9.2.: Factor pattern matrix for Sense of Coherence Scale

	Item	Factor		
		1	2	3
Comprehensibility	Q1	-0.227	-0.412	-0.105
	Q3	0.217	-0.163	-0.330
	Q5	-0.633	0.134	-0.010
	Q10	0.292	0.049	-0.116
	Q12	0.402	-0.057	-0.250
	Q15	0.309	0.154	-0.158
	Q17	0.149	-0.007	-0.125
	Q19	0.518	0.236	0.011
	Q21	0.516	0.140	0.151
	Q24	0.471	0.130	0.017
	Q26	0.184	0.508	0.091
Manageability	Q2	0.271	0.258	0.046
	Q6	-0.501	-0.174	-0.152
	Q9	0.523	-0.077	-0.061
	Q13	0.103	-0.311	0.258
	Q18	0.122	0.366	0.039
	Q20	-0.434	0.034	0.326
	Q23	-0.010	-0.369	-0.019
	Q25	-0.604	0.025	-0.019
	Q27	-0.021	-0.504	0.066
Q29	0.423	0.037	-0.288	
Meaningfulness	Q4	-0.047	-0.335	0.101
	Q7	-0.151	0.146	0.468
	Q8	-0.189	0.283	-0.483
	Q11	0.202	-0.114	0.624
	Q14	0.061	-0.161	0.481
	Q16	-0.234	0.058	0.553
	Q22	-0.153	0.629	-0.101
	Q28	0.148	0.286	-0.265

As displayed in Table 9.2, the factor analysis conducted on the Sense of Coherence Scale confirms the existence of three separate dimensions included in the scale. A concern in this regard would be that the items included in the three dimensions identified in the factor analysis do not correspond with the formal scale dimensions as specified by Antonovsky (1993) in his Sense of Coherence Scale. A possible reason for this phenomenon would be that the responses of both the experimental and the control group to the individual items included in the Sense of Coherence Scale tended to be negatively skewed (a more detailed discussion in this regard will be provided in Paragraph 9.4.).

In this study, Questions 1 and 26 included in the Comprehensibility dimension (Factor 1) of Antonovsky's Sense of Coherence Scale loaded on Factor 2 in the rotated factor matrix. Questions 6, 9, and 25 included in the Manageability dimension (Factor 2) of Antonovsky's Sense of Coherence Scale loaded on Factor 1 in the rotated factor matrix. Questions 4 and 22 included in the Meaningfulness dimension (Factor 3) of Antonovsky's Sense of Coherence Scale loaded on Factor 2 in the rotated factor matrix.

More than 20 percent of the items (6 items of the 29) included in the Sense of Coherence Scale loaded on more than one factor. Items 2, 8, 13, 20, 28 and 29 each had dual factor loadings. This means that the factors identified in the factor analysis of the Sense of Coherence Scale do not clearly correspond to the dimensions as identified by Antonovsky (1993). This gives weight to the argument that a single overall Sense of Coherence score should be utilised in this study.

9.2.2.3. Inter-correlations between Sense of Coherence subscales

Table 9.3 reflects the correlations obtained among the Sense of Coherence dimensions.

Table 9.3.: Inter-correlations among the three Sense of Coherence factors

Correlations	Comprehensibility	Manageability	Meaningfulness
Comprehensibility	1		
Manageability	0.702	1	
Meaningfulness	0.567	0.612	1

Note. $p < 0.05$ for all correlations



According to Clark and Watson (1995: 316), the inter-scale correlations among the dimensions should be between 0.15 and 0.5. The correlation between the two dimensions should not be too high, as they will then evaluate the same construct. The correlation must also not be too low, as two totally unrelated factors would then be included in the same measuring instrument.

Correlations among the three Sense of Coherence factors were found to be higher than 0.5. Considering the guidelines provided by Clark and Watson (1995), the strong correlations observed among the three Sense of Coherence factors indicate that they could probably be measuring the same underlying construct.

9.2.2.4. Summary

From the analyses conducted on the Sense of Coherence Scale it is evident that utilising one overall Sense of Coherence scale would provide a more reliable and valid reflection of the construct, as opposed to utilising the three separate sub-dimensions. Based on these observations, only the overall Sense of Coherence score will be included in this research. These findings are in line with Antonovsky's (1993: 731) findings that the three separate Sense of Coherence scales could not be clearly confirmed by means of factor analysis. As a result, Antonovsky declares that it may therefore not make much sense to interpret the three Sense of Coherence scales separately, and that it would be more appropriate to use the overall Sense of Coherence score.

9.2.3. Hardiness Scale

9.2.3.1. Reliability of Hardiness Scale

i. Internal consistency

The reliability of the dimensions included in the Hardiness Scale was determined by calculating the Cronbach Alpha coefficients for each of the dimensions. The results obtained in this regard can be seen in Table 9.4 below:



Table 9.4.: Cronbach Alphas for Hardiness dimensions

Dimension	Number of items	Cronbach Alpha
Overall Hardiness	50	0.865
Comprehensibility	16	0.752
Manageability	17	0.713
Meaningfulness	17	0.738

As depicted in Table 9.4, the Cronbach Alpha coefficients for the three separate Hardiness factors were found to be satisfactory. The reliability obtained for the three Hardiness factors compare well with the results obtained from research conducted by Kobasa (1979), which indicated an average alpha coefficient of 0.70 for Commitment, Control, and Challenge. Subsequent research conducted by Harrisson et al (2002) indicated Cronbach Alpha coefficients for the three subscales included in the Hardiness Scale as follows: Commitment ($\alpha = 0.64$); Control ($\alpha = 0.70$); and Challenge ($\alpha = 0.70$).

The Cronbach Alpha Coefficient obtained for the overall Hardiness factor was 0.865. This result is in line with the overall alpha coefficient of 0.90 reported by Kobasa (1979), as well as with the coefficient of 0.85 obtained during a study conducted by Harrisson et al (2002).

Based on the results obtained from this study, the three sub-dimensions included in Kobasa's Hardiness Scale were found reliable. However, the overall Hardiness factor was found to be a more reliable indicator of the hardiness construct.

ii. Item-total scale correlations

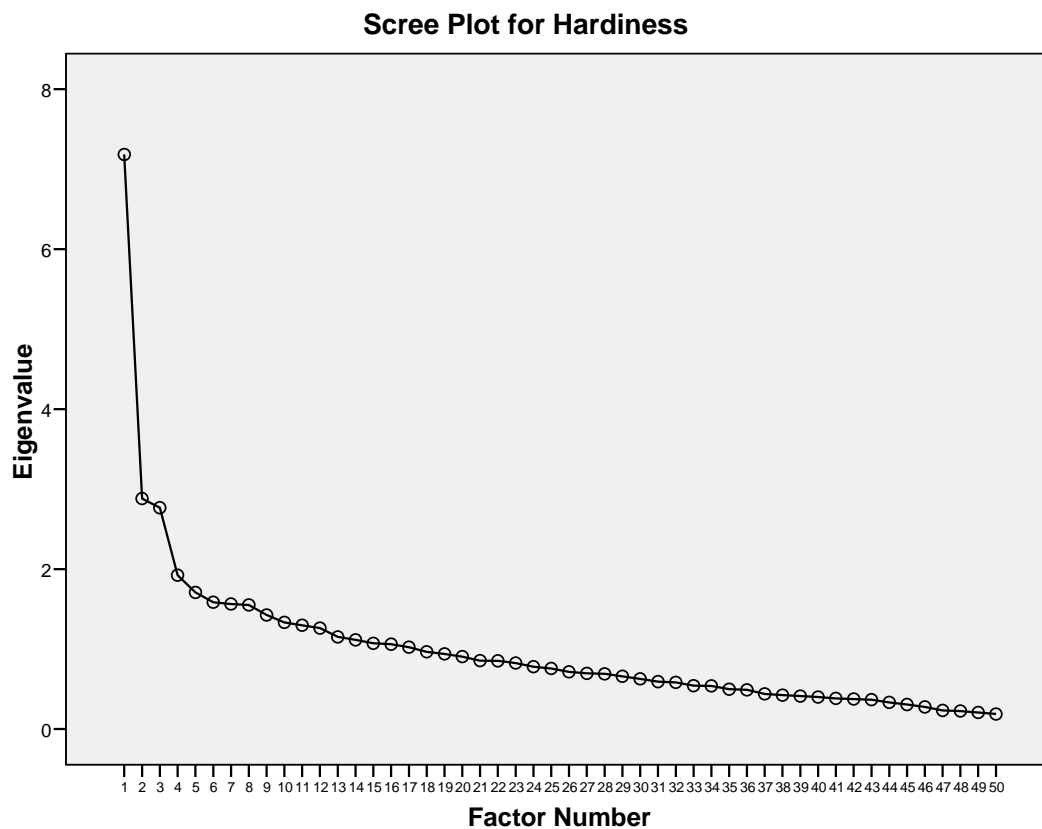
In order to determine the item means, variance, individual item-to-overall scale correlations, and the frequency distribution of responses on the Hardiness Scale, an item analysis was conducted. The outcomes of the item analysis are presented in Appendix B.

The results of the item analysis indicate that most of the individual items included in the Hardiness scale meet the 0.15 to 0.5 item-scale correlation requirement as suggested by Clark and Watson (1995: 316). The lowest correlations were found for items 46 ($r = 0.24$), 12 ($r = 0.28$), and 26 ($r = 0.29$). The highest item-scale correlation was found for question 17 ($r = 0.64$). The average item-scale correlation obtained for the Hardiness Scale during this research was 0.44. The results obtained from the item analysis indicate that most of the items included in the Hardiness Scale reliably contribute to the particular scales they were intended to assess.

9.2.3.2. Factor structure for Hardiness Scale

Figure 9.2 reflects the outcomes of the scree plot analysis for the Hardiness data.

Figure 9.2.: Scree plot analysis for Hardiness Scale



The scree plot obtained from the factor analysis conducted on the Hardiness Scale found that three factors explain 25.67 percent of the variance observed in the data. However, the scree plot also indicates the existence of a latent factor (Factor 1) that carries a substantial weight in explaining 14.37 percent of the variance in the data.

Taking into account the strong presence of Factor 1, the inference can be made that a higher order factor is assessed in the Hardiness Scale.

A maximum likelihood factor analysis with Promax rotation ($k = 4$) was conducted on the Hardiness Scale data. The factor pattern matrix obtained from this analysis is presented in Table 9.5.

Table 9.5.: Factor pattern matrix for Hardiness Scale

Scale	Item	Factor		
		1	2	3
Commitment	Q1	-0.203	0.082	0.256
	Q8	0.379	0.078	-0.073
	Q11	0.487	-0.011	0.027
	Q14	0.407	0.026	-0.124
	Q17	0.674	-0.031	-0.019
	Q20	0.379	-0.098	0.178
	Q23	-0.080	-0.131	0.504
	Q26	-0.014	-0.175	0.239
	Q29	0.475	0.043	-0.072
	Q32	0.365	-0.060	-0.129
	Q38	0.288	0.090	-0.160
	Q39	0.186	-0.017	-0.134
	Q41	0.444	-0.121	-0.022
	Q44	0.473	-0.009	0.007
	Q47	0.536	-0.053	0.038
Q50	0.421	0.058	0.058	

Table 9.5 continued: Factor pattern matrix for Hardiness Scale

Scale	Item	Factor		
		1	2	3
	Q2	0.062	-0.363	0.275
	Q6	0.084	0.483	0.050
	Q9	0.195	0.452	0.267
	Q12	0.305	-0.083	0.101
	Q15	0.273	0.224	0.278
	Q18	0.081	0.319	0.009
	Q21	0.078	0.134	0.363
	Q24	0.028	-0.401	0.129
	Q27	0.349	-0.616	0.056
	Q30	0.069	0.521	-0.001
	Q33	-0.067	0.323	0.477
	Q36	0.049	0.630	0.024
	Q37	0.426	0.108	0.244
	Q40	0.232	0.189	0.118
	Q43	-0.115	0.692	-0.141
	Q46	0.418	-0.077	-0.268
	Q49	0.220	0.248	0.044
Challenge	Q3	-0.095	-0.281	0.209
	Q4	0.096	-0.029	0.566
	Q5	-0.185	-0.032	0.455
	Q7	0.362	0.170	-0.066
	Q10	0.305	0.042	-0.114
	Q13	0.282	0.000	-0.138
	Q16	0.347	0.091	0.042
	Q19	0.541	0.038	-0.039
	Q22	0.007	-0.090	0.427
	Q25	0.117	-0.243	0.391
	Q28	0.197	0.026	-0.256
	Q31	0.373	0.060	-0.095
	Q34	0.490	-0.111	-0.037
	Q35	0.214	0.161	-0.098
	Q42	0.338	-0.005	0.078
Q45	0.397	0.059	-0.084	
Q48	0.278	0.136	-0.050	



The analysis presented in Table 9.5 confirms the existence of three separate factors included in the Hardiness scale. A concern in this regard would be that the items loading on the three dimensions identified in the factor analysis do not correspond with the formal Hardiness scale dimensions specified by Kobasa (1979).

As was presented in Table 9.5., items 1, 23 and 26 included in the Commitment dimension (Factor 1) of Kobasa’s Hardiness Scale loaded on Factor 3 in the rotated factor matrix. Item 21 loaded on the Control dimension (Factor 2) of the Hardiness Scale. Items 7, 10, 13, 16, 19, 31, 34, 42, 45 and 48 of Kobasa’s Challenge dimension (Factor 3) loaded on Factor 1, and item 3 loaded on Factor 2 in the rotated factor analysis. This means that 11 out of the 17 questions included in the Challenge dimension correlated more strongly with the other dimensions included in the questionnaire. Four of the items included in the Hardiness Scale had dual factor loadings, namely items 2, 9, 15 and 46.

As a consequence to the high number of items that either did not load on the intended factor, or did not load on any specific factor, it would be more appropriate to make use of the overall score as a valid measure of the Hardiness construct, rather than the three sub-dimensions.

9.2.3.3. Inter-correlations among Hardiness scales

Table 9.6 displays the inter-scale correlations among the three Hardiness dimensions. The inter-scale correlations between Commitment and Control were found to be high ($r = 0.608$). Significant correlations were found between Challenge and both Commitment ($r = 0.401$) and Control ($r = 0.448$). Based on the inter-correlations observed among the three factors, the inference can be made that all three dimensions may be assessing the same underlying construct.

Table 9.6.: Inter-correlations among three Hardiness factors

Correlations	Commitment	Control	Challenge
Commitment	1		
Control	0.608	1	
Challenge	0.401	0.448	1

Note. $p < 0.05$ for all correlations

9.2.3.4. Summary

The statistical analyses conducted on the factor structuring of the Hardiness Scale indicate that it would be more appropriate to make use of the overall Hardiness score as an indication of expatriate emotional health, as opposed to making use of the three sub-factors included. This finding is in line with the meta-analysis conducted by Pott (1998), which indicates that the three components of Hardiness overlap with each other, and should therefore be calculated as a single factor.

Kobasa herself (as cited in Kosaka, 1996) summarised the scores of the three Hardiness components in her own studies and divided them by 3 to obtain an overall trait during the studies she conducted on the Hardiness scale.

9.2.4. Organisational Climate Questionnaire

9.2.4.1. Reliability of Organisational Climate Questionnaire

i. Internal consistency

The Cronbach Alpha coefficients obtained for the overall Climate Questionnaire and the six selected Climate factors included in the research can be viewed in Table 9.7.

Table 9.7.: Cronbach Alpha coefficients obtained for Climate variables

Dimension	Number of items	Cronbach Alpha
Climate Questionnaire	30	0.923
Role clarity	5	0.695
Communication	5	0.728
Satisfaction	5	0.758
Tension	5	0.529
Stay	5	0.787
Leadership	5	0.827

The Cronbach Alpha coefficient of the overall Climate Questionnaire is 0.923, which indicates that the questionnaire is a reliable measuring instrument for the purposes of this research.

Nunnally (1978) suggests that a Cronbach Alpha of between 0.5 and 0.6 is satisfactory for research purposes, and 0.8 for selection purposes. As the Climate questionnaire was not included in this research to be utilised for selection purposes, all six selected Climate factors were found sufficiently reliable to be included in this research.

ii. Item-total scale correlations

An item analysis was conducted in order to determine the item-total scale correlation and the frequency distribution of responses on the Organisational Climate Questionnaire. The table displaying the item analysis for the Organisational Climate Questionnaire can be seen in Appendix C.

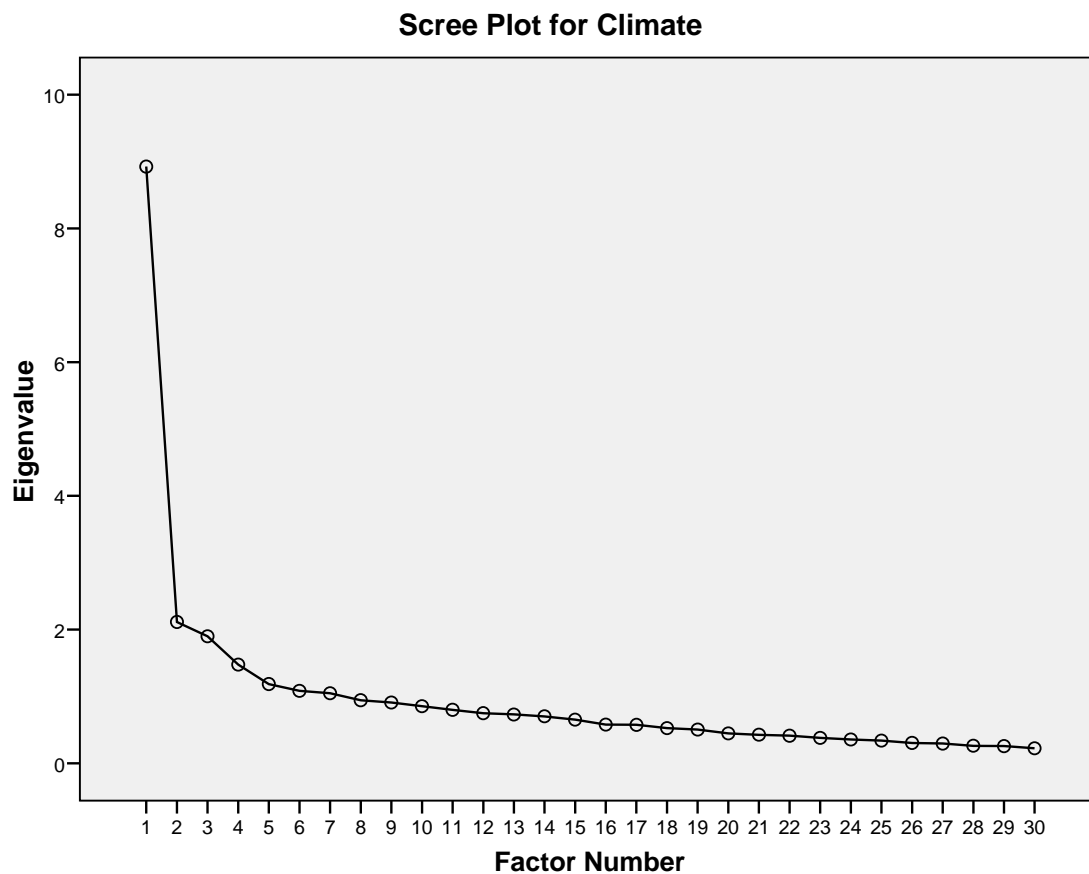
The item analysis indicates that most of the individual items included in the Climate scale meet the 0.15 to 0.5 item-scale correlation requirement as suggested by Clark and Watson (1995: 316). The lowest correlation was found for item 76 ($r = 0.45$). The highest item-scale correlation was found for question 47 ($r = 0.82$). The average item-scale correlation obtained for the Climate questionnaire during this research was 0.70. This is a relatively high average correlation, which indicates that the scales are probably measuring fairly narrowly defined constructs.

Based on the reliability analysis conducted on the questionnaire, the Organisational Climate Questionnaire was found to be sufficiently reliable to be included in this research study.

9.2.4.2. Factor structure of Organisational Climate Questionnaire

The scree plot obtained for the Organisational Climate Questionnaire can be seen in Figure 9.3 below:

Figure 9.3.: Scree plot for Organisational Climate Questionnaire



The scree plot obtained from the factor analysis of the Climate Questionnaire found evidence of the existence of a latent factor that explains 29.75 percent of the variance in the data. These findings are in line with research conducted by Neal et al (2000) which confirms the existence of climate as a single higher order factor referred to as “general psychological climate”.

In order to investigate the factorial structure of the six Climate dimensions to be included in this study, a maximum likelihood factor analysis with Promax rotation ($k = 4$) was conducted. The extraction of six factors explained 55.63 percent of the variance in the data. The results of the factor analysis conducted on the six selected Climate factors are presented in Table 9.8:

Table 9.8.: Factor pattern matrix analysis for Climate Questionnaire

Scale	Item	Factor					
		1	2	3	4	5	6
Leadership	Q15	0.728	0.106	-0.019	-0.048	0.094	-0.009
	Q31	0.446	-0.179	0.120	0.303	-0.104	0.132
	Q47	0.790	0.072	0.014	-0.053	0.024	-0.024
	Q63	0.422	0.076	-0.293	0.711	-0.111	-0.041
	Q79	0.610	0.018	0.071	0.131	-0.069	0.104
Propensity to stay	Q13	0.286	0.214	0.016	0.135	-0.056	-0.036
	Q29	0.107	0.597	0.014	-0.152	0.094	0.228
	Q45	0.164	0.581	-0.066	-0.052	0.087	0.294
	Q61	-0.058	-0.831	0.009	0.185	-0.046	0.009
	Q77	0.020	0.727	-0.064	0.224	-0.146	0.078
Role Clarity	Q3	-0.107	-0.025	-0.195	-0.254	0.069	0.096
	Q19	0.256	-0.099	0.510	0.036	0.028	-0.072
	Q35	-0.049	0.078	0.744	-0.054	-0.103	0.148
	Q51	0.147	0.011	0.857	-0.089	-0.134	-0.073
	Q67	-0.108	0.052	0.193	0.300	0.092	0.114
Communication	Q7	-0.112	-0.032	0.279	0.389	0.064	0.405
	Q23	0.103	0.011	0.199	0.310	0.243	0.015
	Q39	0.358	-0.184	0.189	0.339	0.029	0.054
	Q55	0.054	0.037	0.099	0.470	0.071	-0.007
	Q71	-0.491	-0.016	-0.115	-0.033	-0.118	0.134
Tension	Q12	-0.189	0.003	0.042	-0.015	-0.534	0.013
	Q28	0.033	0.145	0.075	0.022	-0.750	0.211
	Q44	-0.022	-0.161	0.004	-0.148	-0.317	0.049
	Q60	-0.078	-0.197	-0.077	-0.136	-0.124	-0.093
	Q76	-0.066	-0.110	0.086	-0.120	0.074	-0.301
Satisfaction	Q11	-0.084	0.172	0.518	-0.013	0.146	-0.214
	Q27	-0.100	0.486	0.110	0.111	0.007	-0.251
	Q43	0.005	0.160	-0.079	0.168	0.246	-0.560
	Q59	0.171	-0.395	-0.144	-0.240	-0.078	0.096
	Q75	0.001	0.837	0.106	0.130	-0.248	-0.123

As was depicted in Table 9.8, the majority of items included in the Climate Questionnaire loaded onto their expected factors as specified by Kossuth (1998). An interesting finding would be the scattered loading of the items included in the Satisfaction dimension (Factor 6). Most of the questions included in Satisfaction seem to have meaningful primary loadings on the Propensity to Stay factor (Factor 2).

9.2.4.3. Inter-correlations among selected Organisational Climate subscales

Table 9.9 presents the inter-correlations found among the six selected Climate variables.

Table 9.9.: Inter-correlations among six selected Climate variables

	Role clarity	Communication	Satisfaction	Tension	Propensity to stay	Leadership
Role Clarity	1					
Communication	0.60	1				
Satisfaction	0.48	0.48	1			
Tension	-0.38	-0.52	-0.39	1		
Propensity to Stay	0.42	0.52	0.57	-0.48	1	
Leadership	0.43	0.68	0.35	-0.47	0.59	1

Note. $p < 0.05$ for all correlations

As presented in Table 9.9, the factors included in the Climate Questionnaire are significantly correlated. These correlations indicate that, although the six Climate factors may be measuring an underlying latent Climate factor, they are still sufficiently independent to be included as separate variables in this study. The correlations are in the theoretically expected directions.

9.2.4.4. Summary

During the literature study conducted, six Climate dimensions were identified as having a significant influence on the expatriate from a work environment perspective during the various phases of the international career cycle. It was therefore decided to include them as separate dimensions.

Despite Satisfaction not emerging as an independent factor and having lower reliability, it was decided to keep it as a variable in the study. However, results obtained for the Satisfaction variable will need to be interpreted with caution.

9.3. Clarification of variables

For the purposes of simplification, the following codes will be used where necessary when referring to the questionnaires and dimensions included in the research:

Table 9.10.: Abbreviations for variables

Code	Description	Code	Description
SOC	Sense of Coherence	16PF	16PF Questionnaire
SOC (B)	Sense of Coherence before departure	A	Outgoing
SOC (D)	Sense of Coherence during assignment	C	Stable
SOC (A)	Sense of Coherence after assignment	E	Assertive
HARD	Hardiness	F	Enthusiastic
HARD (B)	Hardiness before departure	G	Conscientious
HARD (D)	Hardiness during assignment	H	Adventurous
HARD (A)	Hardiness after assignment	I	Sensitive
Climate	Organisation Climate	L	Suspicious
Role (B)	Role Clarity before departure	M	Imaginative
Role (D)	Role Clarity during assignment	N	Shrewd
Comm (B)	Communication before departure	O	Apprehensive
Comm (D)	Communication during assignment	Q1	Liberal
Sat (B)	Satisfaction before assignment	Q2	Self-sufficient
Sat (D)	Satisfaction during assignment	Q3	Control
Tense (B)	Tension before assignment	Q4	Tense
Tense (D)	Tension during assignment	EXTRA	Extraversion
Stay (B)	Propensity to stay before assignment	ANXIETY	Anxiety proneness
Stay (D)	Propensity to stay during assignment	OPEN	Openness
Lead (B)	Leadership before assignment	INDEPEND	Independence
Lead (D)	Leadership during assignment	CONTR	Self-Control

9.4 Descriptive statistics for the different measurement scales

In this section, the descriptive statistics obtained on the scale dimensions included in this research will be presented and discussed. The statistics provided in this section will be based on the analyses conducted on the experimental group (n = 84) and the control group (n = 42). The additional participants included for the purposes of calculating the reliability and construct validity of the instruments were excluded from all further analyses conducted during this research because of incomplete data (refer Paragraph 8.4.2, Chapter 8).

Table 9.11 provides the descriptive statistics of the emotional health and Climate scales for the experimental group and Table 9.12 the distribution statistics for the control group.

Table 9.11.: Descriptive statistics of the emotional health and climate scales for the experimental group

Factors	N	Mean	SD	Skewness		Kurtosis		Min	Max
				Statistic	SE	Statistic	SE		
SOC (B)	84	5.89	0.56	-0.632	0.263	0.596	0.520	4.20	6.88
HARD (B)	84	3.46	0.20	-0.032	0.263	0.791	0.520	2.84	3.92
Role (B)	84	3.60	0.50	0.179	0.263	1.628	0.520	2.20	5.00
Comm (B)	84	3.36	0.53	0.013	0.263	-0.094	0.520	2.00	4.00
Sat (B)	84	3.74	0.48	-0.814	0.263	1.391	0.520	2.00	4.80
Tense (B)	84	2.55	0.65	-0.042	0.263	0.118	0.520	1.20	4.20
Stay (B)	84	3.51	0.52	-0.615	0.263	0.043	0.520	2.00	5.00
Lead (B)	84	3.42	0.94	-0.552	0.263	-0.552	0.520	1.20	4.80
SOC (D)	84	5.30	0.69	-0.475	0.263	0.128	0.520	3.53	6.53
HARD (D)	84	3.24	0.27	-0.598	0.263	0.717	0.520	2.50	3.76
Role (D)	84	3.39	0.51	-0.199	0.263	-0.351	0.520	2.20	4.40
Comm (D)	84	3.17	0.64	-0.239	0.263	0.043	0.520	1.40	4.60
Sat (D)	84	3.60	0.47	-0.324	0.263	0.247	0.520	2.60	5.00
Tense (D)	84	2.91	0.65	0.084	0.263	-0.042	0.520	1.00	4.00
Stay (D)	84	3.30	0.48	-0.579	0.263	0.095	0.520	2.00	4.20
Lead (D)	84	3.28	0.77	-0.410	0.263	-0.749	0.520	1.60	4.60
SOC (A)	84	4.91	0.68	-0.150	0.263	-0.419	0.520	3.26	6.14
HARD (A)	84	3.12	0.32	-0.216	0.263	0.187	0.520	2.20	3.88

Table 9.12.: Descriptive statistics of emotional health and climate scales for control group

Factors	N	Mean	SD	Skewness		Kurtosis		Min	Max
				Statistic	SE	Statistic	SE		
SOC (B)	42	5.62	0.53	-0.150	0.365	-1.256	0.717	4.62	6.41
HARD (B)	42	3.15	0.31	-0.285	0.365	-0.093	0.717	2.46	3.84
Role (B)	42	3.52	0.60	-0.017	0.365	0.175	0.717	2.00	4.80
Comm (B)	42	3.12	0.70	-0.424	0.365	0.592	0.717	1.00	4.00
Sat (B)	42	3.43	0.48	-0.513	0.365	0.397	0.717	2.00	4.20
Tense (B)	42	2.90	0.64	-0.445	0.365	-0.054	0.717	1.20	4.20
Stay (B)	42	3.10	0.65	-0.223	0.365	-0.789	0.717	2.00	4.00
Lead (B)	42	3.04	1.04	0.164	0.365	-0.666	0.717	1.00	5.00
SOC (D)	42	5.60	0.52	-0.070	0.365	-1.232	0.717	4.62	6.44
HARD (D)	42	3.17	0.31	-0.411	0.365	-0.170	0.717	2.46	3.84
Role (D)	42	3.59	0.64	-0.145	0.365	-0.337	0.717	2.00	4.80
Comm (D)	42	3.08	0.67	-0.486	0.365	0.790	0.717	1.20	4.40
Sat (D)	42	3.46	0.50	-0.560	0.365	0.126	0.717	2.00	4.20
Tense (D)	42	2.89	0.64	-0.344	0.365	-0.142	0.717	1.00	4.00
Stay (D)	42	3.15	0.69	-0.264	0.365	-0.993	0.717	1.80	4.20
Lead (D)	42	3.02	1.03	0.221	0.365	-0.556	0.717	1.00	5.00
SOC (A)	42	5.58	0.69	-0.768	0.365	-0.032	0.717	3.79	6.55
HARD (A)	42	3.19	0.31	-0.579	0.365	0.560	0.717	2.44	3.86

It is evident from the statistics presented in Tables 9.11 and 9.12 that the responses of both the experimental and control groups to the individual items included in all three questionnaires tended to be negatively skewed. According to Porkess (2004: 231), skewness measures the deviation of the distribution of responses from symmetry. If the skewness is significantly different from 0, then that distribution is asymmetrical, while normal distributions are perfectly symmetrical. If the skewness is towards the negative pole, it indicates that the respondents may have tended to endorse the higher categories on a scale.

In turn, this skewness in the results can have an impact on the kurtosis. According to Porkess (2004:136), kurtosis refers to the sharpness of the peak of a distribution. The kurtosis of the normal distribution is 0. If the kurtosis is significantly different than 0, then the distribution is either flatter or more peaked than normal.

In Paragraph 8.4.2 in Chapter 8 a discussion was conducted on the demographics of the participants included in the experimental and control groups. The two groups appeared to be very similar in their demographic distribution. Taking into account these similarities, it is worth noting that the overall mean scores of the experimental group on the variables included in this study are considerably higher than those of the control group (refer Tables 9.11 and 9.12).

A noticeable difference observed in the demographics of the experimental and control groups was in their racial distribution. As was discussed in Paragraph 8.4.2.3 in Chapter 8, the vast majority of participants included in the experimental group were white males (75 percent) as compared to the 59.5 percent white males included in the control group. Reference was also made to the situation within which white males in South Africa find themselves, where they are not always able to find alternative employment due to factors such as Affirmative Action limiting the career opportunities available to them. These individuals often view themselves as having no alternative than to consider other opportunities outside South Africa, despite the turmoil and adjustment issues associated with leaving one's family and support structures at home. In their eagerness to be appointed in expatriate positions available with reputable South African companies, these individuals may "over-present" themselves when they complete the self-assessments during the initial preparation and selection process prior to their departure on assignment to the foreign countries.

It is important to consider the above mentioned observations when conducting an analysis of the results obtained during this study, especially taking into account the cautionary comments made by Kossuth (1998: 197) towards the use of self-assessment instruments during the conduct of research. Kossuth refers to the leniency error which occurs when an individual is asked to compare him or herself with others. Fox, Caspy and Reisler (Kossuth, 1998: 179) also found that the self-appraisal process may be prone to a leniency bias when it is associated with self-assessment for potential promotion. A reason for this occurrence is that the person may tend to provide a positive impression of himself in his attempt to secure a promotion or attractive position.

In order to deal with this leniency problem, Kossuth (1998: 197) recommends that the nature of the situation (in this case potential appointment on an international assignment in a foreign country) and the use of properly validated rating scales need to be considered when utilising a self-appraisal process.

Table 9.13 presents the distribution statistics of the 16PF for the experimental group, and Table 9.14 the distribution statistics for the control group.

Table 9.13.: Descriptive statistics of the 16PF for the experimental group

Experimental Group	N	Mean	SD	Skewness		Kurtosis		Min	Max
				Statistic	SE	Statistic	SE		
A	84	5.86	2.16	-0.207	0.263	-0.864	0.520	1	10
C	84	7.11	1.52	-0.522	0.263	-0.200	0.520	3	10
E	84	6.71	1.81	-0.169	0.263	-0.509	0.520	2	10
F	84	6.74	1.73	0.102	0.263	-0.465	0.520	3	10
G	84	5.33	1.71	-0.478	0.263	0.324	0.520	1	9
H	84	7.57	2.06	-0.450	0.263	-0.813	0.520	2	10
I	84	4.60	2.15	-0.171	0.263	-0.755	0.520	1	9
L	84	4.31	2.01	0.332	0.263	-0.404	0.520	1	10
M	84	4.88	1.81	0.069	0.263	-0.381	0.520	1	9
N	84	5.96	2.08	-0.462	0.263	-0.354	0.520	1	9
O	84	3.24	1.56	0.455	0.263	-0.351	0.520	1	7
Q1	84	7.07	1.68	-0.476	0.263	0.190	0.520	2	10
Q2	84	3.73	2.13	0.529	0.263	-0.150	0.520	1	10
Q3	84	7.23	1.49	-0.265	0.263	-0.652	0.520	4	10
Q4	84	4.23	1.74	0.729	0.263	0.542	0.520	1	10
Extraversion	84	6.54	1.18	-0.178	0.263	-0.479	0.520	3.44	8.64
Anxiety	84	6.91	1.25	-0.498	0.263	-0.021	0.520	3.33	9.58
Openness	84	5.29	1.08	0.011	0.263	-0.650	0.520	3.13	7.46
Independent	84	6.77	1.07	-0.159	0.263	0.318	0.520	3.90	9.60
Self-control	84	5.81	0.89	-0.453	0.263	-0.335	0.520	3.58	7.58

Table 9.14.: Descriptive statistics of the 16PF for the control group

Control Group	N	Mean	SD	Skewness		Kurtosis		Min	Max
				Statistic	SE	Statistic	SE		
A	42	5.52	1.81	0.296	0.365	0.404	0.717	2	10
C	42	5.55	1.70	-0.023	0.365	-0.850	0.717	3	9
E	42	7.55	1.57	-0.754	0.365	0.759	0.717	3	10
F	42	5.90	2.01	0.421	0.365	-0.527	0.717	3	10
G	42	6.07	1.44	-0.079	0.365	-0.057	0.717	3	9
H	42	6.74	1.82	-0.607	0.365	0.653	0.717	2	10
I	42	3.76	1.85	0.050	0.365	-0.725	0.717	1	8
L	42	5.10	2.34	0.266	0.365	-0.186	0.717	1	10
M	42	5.17	1.99	-0.124	0.365	-1.026	0.717	2	9
N	42	6.57	2.20	-0.408	0.365	-0.562	0.717	2	10
O	42	4.36	1.79	-0.196	0.365	-0.991	0.717	1	7
Q1	42	6.81	1.90	-0.182	0.365	-0.295	0.717	2	10
Q2	42	4.33	2.38	0.396	0.365	-0.840	0.717	1	10
Q3	42	7.33	1.37	-0.642	0.365	-0.023	0.717	4	9
Q4	42	4.43	1.71	0.326	0.365	-0.857	0.717	2	8
Extraversion	42	5.89	1.20	-0.239	0.365	1.213	0.717	2.44	8.84
Anxiety	42	5.99	1.17	0.027	0.365	-1.029	0.717	3.83	8.08
Openness	42	5.31	1.15	0.684	0.365	1.503	0.717	3.13	8.63
Independent	42	6.90	1.19	-0.381	0.365	0.172	0.717	3.60	9.10
Self-control	42	6.16	0.96	0.371	0.365	-0.789	0.717	4.58	8.08

As was mentioned earlier, only the 16PF sten scores for the subjects included in the experimental and control group were available during this study. Taking into account the fact that the raw scores for the subjects were not available, the results obtained from the derived sten scores need to be viewed with a certain amount of caution.

9.5. The influence of the expatriation process on the emotional health of the experimental and control groups before, during, and after assignment

9.5.1. Introduction

A General Linear Model procedure (GLM) was used to establish the differences in mean scores between the assessments before, during and after the expatriation process (within subjects factor) as well as between experimental and control groups (between subjects factor) (refer Objective 1, Paragraph 8.1). This procedure was used to establish the differences over time in terms of the Emotional Health and Organisational Climate variables between the experimental and control groups. In order to establish the difference between the experimental and control groups with regard to personality traits, where there was only one measure, an independent sample t-test was used to compare their mean scores.

The experimental group (expatriates) was exposed to the external environment in the foreign countries while on international assignment, while the control group remained in their normal work and living environment in South Africa.

9.5.2. Comparisons between experimental and control groups

The reporting of the statistical results obtained will be conducted as follows:

- Firstly, the results will be displayed and interpreted.
- A comprehensive discussion of the results obtained in attaining Hypothesis 1 can be found in Paragraph 10.1 in Chapter 10.

Results of the GLM procedure are reported in Tables 9.15 to 9.47.

9.5.2.1. Results with regard to Sense of Coherence

The results of the Repeated Measures ANOVA with regard to Sense of Coherence are reported in Table 9.15 below.

Table 9.15.: Test of Sphericity for the Factorial ANOVA conducted on Sense of Coherence

Mauchly's Test of Sphericity ^b							
Measure: MEASURE_1			Df	Sig.	Epsilon ^a		
Within Subjects Effect	Mauchly's W	Approx. Chi-Square			Greenhouse-Geisser	Huynh-Feldt	Lower-bound
SOC	0.939	7.677	2	0.022	0.943	0.965	0.500
b. Design: Intercept + GROUP Within Subjects Design: SOC							

Mauchly's Test of Sphericity is used where more than one level of any of the independent variables are used. As can be seen from the significance value above ($p = 0.022$), the data is not consistent with the sphericity assumption. As a result, multivariate tests need to be used and not the standard, pooled ANOVA results. The results of the multivariate tests conducted on Sense of Coherence can be seen in Table 9.16.

Table 9.16: Multivariate tests conducted on Sense of Coherence

Multivariate Tests ^b							
Effect		Value	F	Hypothesis df	Error df	Sig.	Partial Eta Squared
SOC	Pillai's Trace	0.282	24.208 ^a	2.000	123.000	0.000	0.282
	Wilks' Lambda	0.718	24.208 ^a	2.000	123.000	0.000	0.282
	Hotelling's Trace	0.394	24.208 ^a	2.000	123.000	0.000	0.282
	Roy's Largest Root	0.394	24.208 ^a	2.000	123.000	0.000	0.282
SOC * GROUP	Pillai's Trace	0.253	20.813 ^a	2.000	123.000	0.000	0.253
	Wilks' Lambda	0.747	20.813 ^a	2.000	123.000	0.000	0.253
	Hotelling's Trace	0.338	20.813 ^a	2.000	123.000	0.000	0.253
	Roy's Largest Root	0.338	20.813 ^a	2.000	123.000	0.000	0.253
a. Exact statistic							
b. Design: Intercept + GROUP Within Subjects Design: SOC							

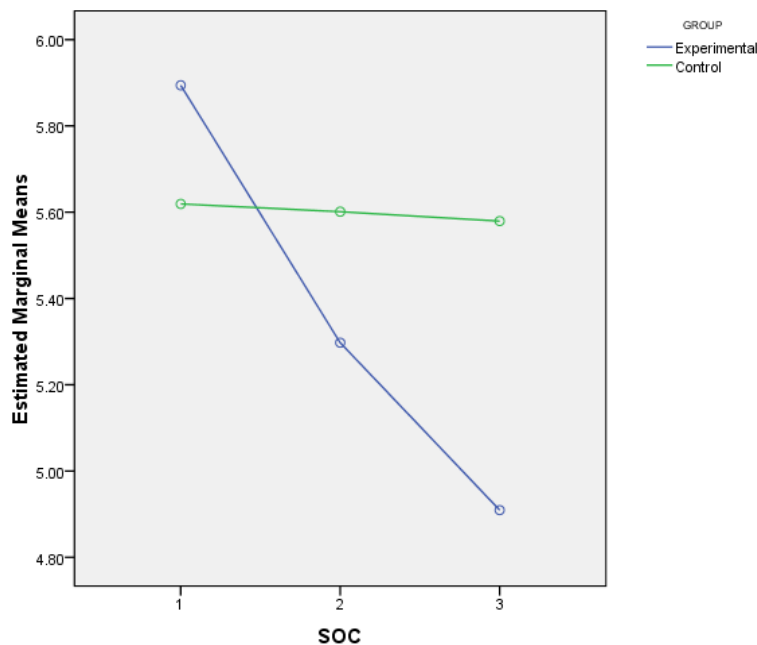
Table 9.16 above shows that there are significant differences between the three SOC measures, and that the interaction between SOC and group membership is also significant. As is evident from the descriptive statistics (Table 9.17) and Figure 9.4 below, the scores of the control group remained fairly stable over time while those of the experimental group showed a definite downward trend.

Table 9.17: Descriptive Statistics for Sense of Coherence

4. GROUP * SOC					
GROUP	SOC	Mean	Std. Error	95% Confidence Interval	
				Lower Bound	Upper Bound
Experimental	1*	5.894	0.060	5.775	6.013
	2	5.297	0.070	5.159	5.436
	3	4.909	0.075	4.762	5.057
Control	1	5.619	0.085	5.451	5.787
	2	5.601	0.099	5.405	5.797
	3	5.579	0.106	5.370	5.789

*Note: 1, 2 and 3 refer to measurements before, during and after assignment period respectively

Figure 9.4: Change in Sense of Coherence mean scores during expatriation phases



Post hoc pairwise comparisons between the three SOC scores of the experimental group (see Table 9.18) and the control group (see Table 9.19) indicated that there were significant differences between all three measurements for the experimental group. No differences for the control group were significant.

Table 9.18: Post hoc pairwise comparisons between SOC scores of experimental group

Pairwise Comparisons ^b						
(I) SOC	(J) SOC	Mean Difference (I-J)	Std. Error	Sig. ^a	95% Confidence Interval for Difference ^a	
					Lower Bound	Upper Bound
1	2	0.597*	0.081	0.000	0.435	0.759
	3	0.985*	0.088	0.000	0.809	1.160
2	1	-0.597*	0.081	0.000	-0.759	-0.435
	3	0.388*	0.105	0.000	0.178	0.598
3	1	-0.985*	0.088	0.000	-1.160	-0.809
	2	-0.388*	0.105	0.000	-0.598	-0.178

Based on estimated marginal means

*. The mean difference is significant at the .05 level.

a. Adjustment for multiple comparisons: Least Significant Difference (equivalent to no adjustments).

b. GROUP = Experimental

Table 9.19: Post hoc pairwise comparisons between SOC scores of control group

Pairwise Comparisons ^b						
(I) SOC	(J) SOC	Mean Difference (I-J)	Std. Error	Sig. ^a	95% Confidence Interval for Difference ^a	
					Lower Bound	Upper Bound
1	2	0.018	0.098	0.856	-0.181	0.217
	3	0.040	0.134	0.769	-0.231	0.310
2	1	-0.018	0.098	0.856	-0.217	0.181
	3	0.022	0.107	0.840	-0.194	0.237
3	1	-0.040	0.134	0.769	-0.310	0.231
	2	-0.022	0.107	0.840	-0.237	0.194

Based on estimated marginal means

a. Adjustment for multiple comparisons: Least Significant Difference (equivalent to no adjustments).

b. GROUP = Control

9.5.2.2. Results with regard to Hardiness

Table 9.20 displays the results of the Repeated Measures ANOVA with regard to Hardiness.

Table 9.20: Test of sphericity for the Factorial ANOVA conducted on Hardiness

Mauchly's Test of Sphericity ^b							
Within Subjects Effect	Mauchly's W	Approx. Chi-Square	Df	Sig.	Epsilon ^a		
					Greenhouse-Geisser	Huynh-Feldt	Lower-bound
Hardiness	0.925	9.633	2	0.008	0.930	0.951	0.500
b. Design: Intercept + GROUP Within Subjects Design: Hardiness							

As was the case with Sense of Coherence, Mauchly's Test of Sphericity ($p = 0.008$) suggests that the pooled ANOVA cannot be used and that adjusted values or Multivariate tests need to be used. The latter are reported below in Table 9.21.

Table 9.21: Multivariate tests conducted on Hardiness

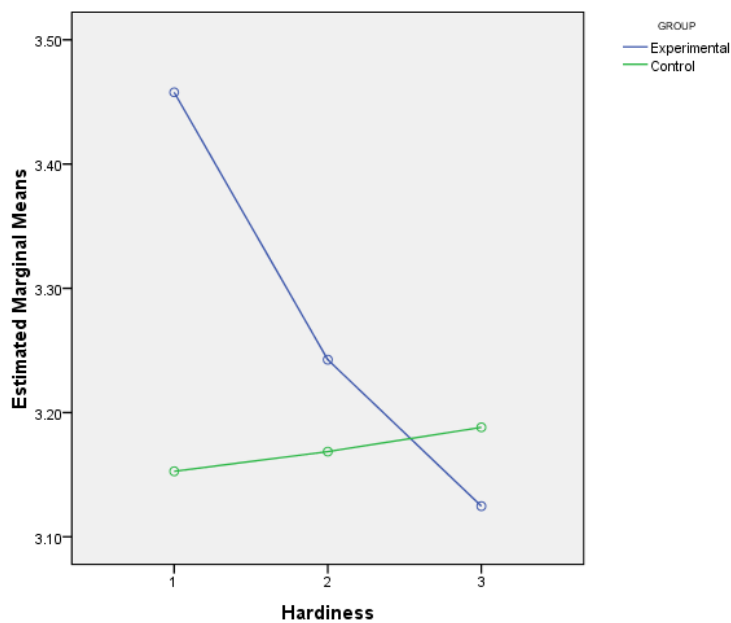
Multivariate Tests ^b							
Effect		Value	F	Hypothesis df	Error df	Sig.	Partial Eta Squared
Hardiness	Pillai's Trace	0.154	11.197 ^a	2.000	123.000	0.000	0.154
	Wilks' Lambda	0.846	11.197 ^a	2.000	123.000	0.000	0.154
	Hotelling's Trace	0.182	11.197 ^a	2.000	123.000	0.000	0.154
	Roy's Largest Root	0.182	11.197 ^a	2.000	123.000	0.000	0.154
Hardiness * GROUP	Pillai's Trace	0.213	16.621 ^a	2.000	123.000	0.000	0.213
	Wilks' Lambda	0.787	16.621 ^a	2.000	123.000	0.000	0.213
	Hotelling's Trace	0.270	16.621 ^a	2.000	123.000	0.000	0.213
	Roy's Largest Root	0.270	16.621 ^a	2.000	123.000	0.000	0.213
a. Exact statistic							
b. Design: Intercept + GROUP Within Subjects Design: Hardiness							

Looking at the multivariate results above it would appear that there are significant differences among the three measures of Hardiness over time (before, during and after). The interaction between Hardiness measures and group membership (experimental versus control group) is also significant. Figure 9.5 and the descriptive statistics provided in Table 9.22 indicate a large difference in Hardiness between the groups to start off with. However, a clear decrease in the scores of the experimental group seemed to occur over time, while the control group showed a marginal increase over the same period.

Table 9.22: Descriptive Statistics for Hardiness

4. GROUP * Hardiness					
GROUP	Hardiness	Mean	Std. Error	95% Confidence Interval	
				Lower Bound	Upper Bound
Experimental	1	3.458	0.026	3.406	3.509
	2	3.243	0.031	3.181	3.304
	3	3.125	0.035	3.056	3.193
Control	1	3.153	0.037	3.080	3.226
	2	3.169	0.044	3.082	3.255
	3	3.188	0.049	3.091	3.285

Figure 9.5: Change in Hardiness mean scores during expatriation phases



Pairwise comparisons (see Tables 9.23 and 9.24 below) with regard to Hardiness for the experimental and control group separately indicated that there are no significant differences between the three measures of the control group on Hardiness, but in the experimental group there are significant differences between the three measures respectively.

Table 9.23: Post hoc pairwise comparisons between Hardiness scores of experimental group

Pairwise Comparisons ^b						
(I) Hardiness	(J) Hardiness	Mean Difference (I-J)	Std. Error	Sig. ^a	95% Confidence Interval for Difference ^a	
					Lower Bound	Upper Bound
1	2	0.215*	0.034	0.000	0.148	0.282
	3	0.333*	0.038	0.000	0.258	0.408
2	1	-0.215*	0.034	0.000	-0.282	-0.148
	3	0.118*	0.048	0.015	0.023	0.213
3	1	-0.333*	0.038	0.000	-0.408	-0.258
	2	-0.118*	0.048	0.015	-0.213	-0.023

Based on estimated marginal means

*. The mean difference is significant at the .05 level.

a. Adjustment for multiple comparisons: Least Significant Difference (equivalent to no adjustments).

b. GROUP = Experimental

Table 9.24: Post hoc pairwise comparisons between Hardiness scores of control group

Pairwise Comparisons ^b						
(I) Hardiness	(J) Hardiness	Mean Difference (I-J)	Std. Error	Sig. ^a	95% Confidence Interval for Difference ^a	
					Lower Bound	Upper Bound
1	2	-0.016	0.067	0.814	-0.151	0.119
	3	-0.035	0.061	0.564	-0.158	0.087
2	1	0.016	0.067	0.814	-0.119	0.151
	3	-0.020	0.067	0.771	-0.154	0.115
3	1	0.035	0.061	0.564	-0.087	0.158
	2	0.020	0.067	0.771	-0.115	0.154

Based on estimated marginal means

a. Adjustment for multiple comparisons: Least Significant Difference (equivalent to no adjustments).

b. GROUP = Control

9.5.2.3. Results with regard to Organisational Climate variables

A Repeated Measures GLM procedure with an added between subjects variable was once again used in the comparison of the Organisational Climate scores between the experimental and control groups over time. However, the within subjects (repeated measures) variable in this case had only two levels, namely assessments before and during the expatriation process.

i. Results for Role Clarity

Results relating to Role Clarity are reported in Table 9.25 below. Tests of sphericity are not relevant here and with regard to all the Climate variables, as only two levels of both independent variables are reported.

Table 9.25: Factorial Anova for Role Clarity

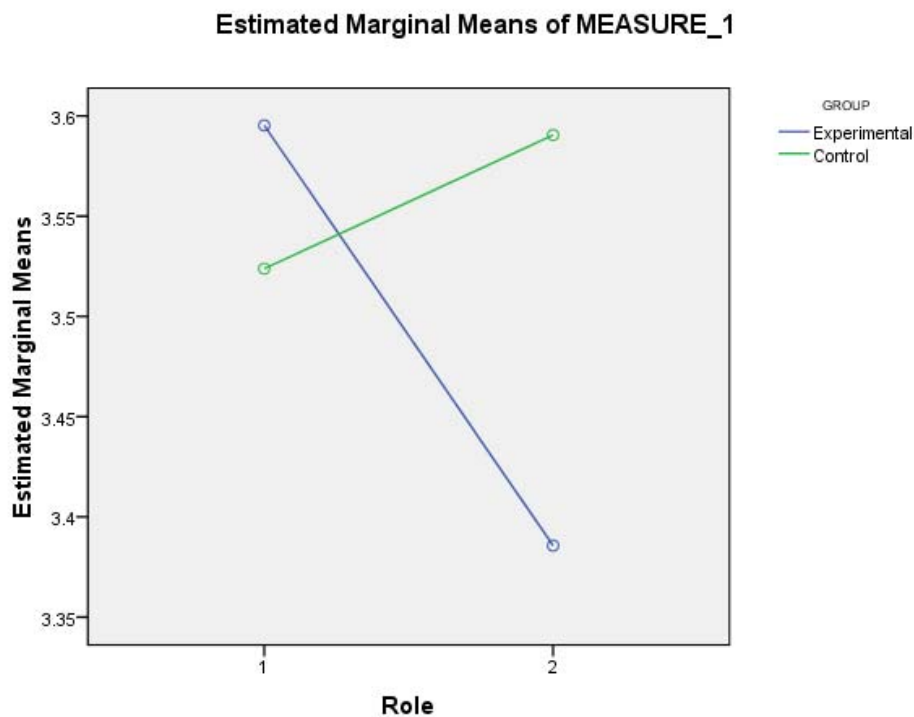
Tests of Within-Subjects Effects							
Source		Type III Sum of Squares	Df	Mean Square	F	Sig.	Partial Eta Squared
Role	Sphericity Assumed	0.286	1.000	0.286	1.081	0.300	0.009
	Greenhouse-Geisser	0.286	1.000	0.286	1.081	0.300	0.009
	Huynh-Feldt	0.286	1.000	0.286	1.081	0.300	0.009
	Lower-bound	0.286	1.000	0.286	1.081	0.300	0.009
Role * GROUP	Sphericity Assumed	1.068	1.000	1.068	4.042	0.047	0.032
	Greenhouse-Geisser	1.068	1.000	1.068	4.042	0.047	0.032
	Huynh-Feldt	1.068	1.000	1.068	4.042	0.047	0.032
	Lower-bound	1.068	1.000	1.068	4.042	0.047	0.032
Error (Role)	Sphericity Assumed	32.763	124	0.264			
	Greenhouse-Geisser	32.763	124.000	0.264			
	Huynh-Feldt	32.763	124.000	0.264			
	Lower-bound	32.763	124.000	0.264			

The overall main effect of Role Clarity is not significant. However, there is a marginally significant interaction between group membership and role score, implying that there may be significant differences in one group but not in the other. Figure 9.6 and the descriptive statistics provided in Table 9.26 below demonstrate a decrease in Role clarity for the experimental group and a marginal increase for the control group, which confirms this interaction.

Table 9.26: Descriptive Statistics for Role Clarity

GROUP * Role Clarity					
GROUP	Role Clarity	Mean	Std. Error	95% Confidence Interval	
				Lower Bound	Upper Bound
Experimental	1	3.595	0.058	3.481	3.710
	2	3.386	0.060	3.266	3.505
Control	1	3.524	0.082	3.362	3.686
	2	3.590	0.085	3.422	3.759

Figure 9.6: Change in Role Clarity mean scores during expatriation phases



The outcomes of pairwise comparisons of the experimental and control groups respectively can be seen in Tables 9.27 and 9.28 below. The results show that there was a significant difference in Role Clarity for the experimental group in the before – and during measurements, but not for the control group.

Table 9.27: Pairwise comparisons between Role Clarity scores of experimental group

Pairwise Comparisons ^b						
(I) Role Clarity	(J) Role Clarity	Mean Difference (I-J)	Std. Error	Sig. ^a	95% Confidence Interval for Difference ^a	
					Lower Bound	Upper Bound
1	2	0.210*	0.078	0.009	0.054	0.365
2	1	-0.210*	0.078	0.009	-0.365	-0.054
Based on estimated marginal means						
*. The mean difference is significant at the .05 level.						
a. Adjustment for multiple comparisons: Least Significant Difference (equivalent to no adjustments).						
b. GROUP = Experimental						

Table 9.28: Pairwise comparisons between Role Clarity scores of control group

Pairwise Comparisons ^b						
(I) Role Clarity	(J) Role Clarity	Mean Difference (I-J)	Std. Error	Sig. ^a	95% Confidence Interval for Difference ^a	
					Lower Bound	Upper Bound
1	2	-0.067	0.116	0.567	-0.300	0.167
2	1	0.067	0.116	0.567	-0.167	0.300
Based on estimated marginal means						
a. Adjustment for multiple comparisons: Least Significant Difference (equivalent to no adjustments).						
b. GROUP = Control						

ii. Results for Communication

Results relating to Communication are reported in Table 9.29 below.

Table 9.29: Factorial Anova for Communication

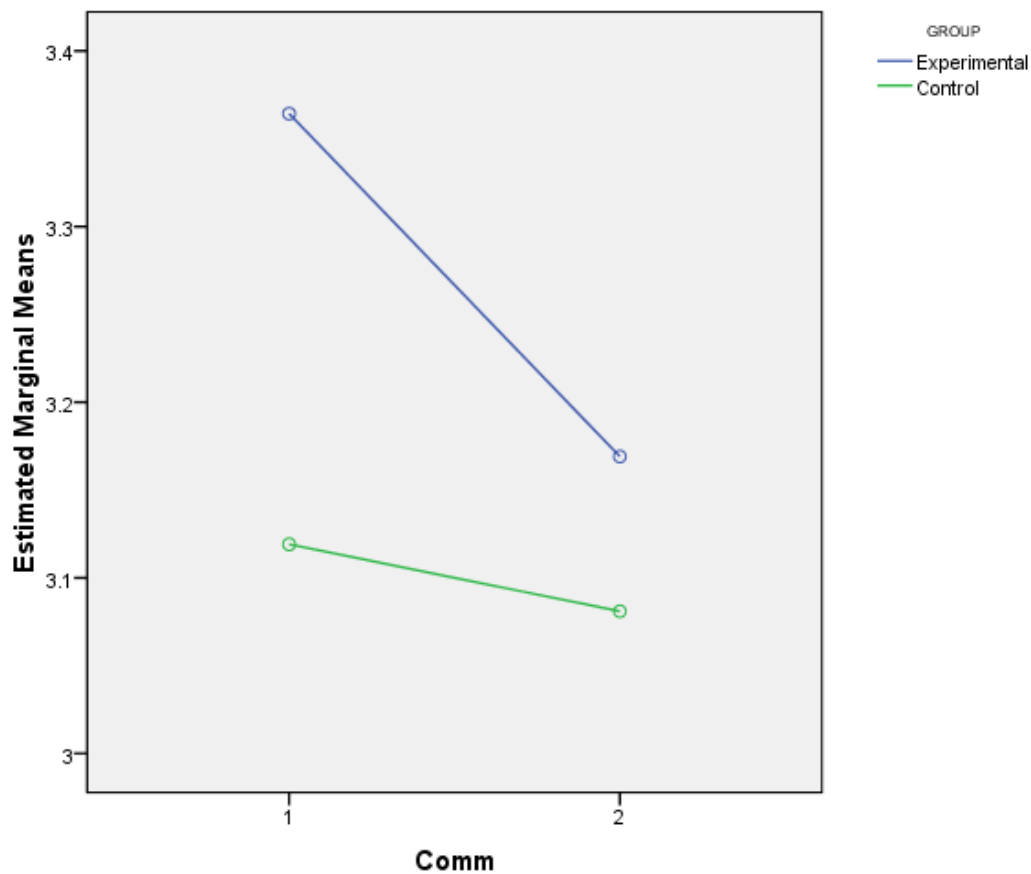
Tests of Within-Subjects Effects							
Source		Type III Sum of Squares	Df	Mean Square	F	Sig.	Partial Eta Squared
Comm	Sphericity Assumed	0.762	1.000	0.762	2.131	0.147	0.017
	Greenhouse-Geisser	0.762	1.000	0.762	2.131	0.147	0.017
	Huynh-Feldt	0.762	1.000	0.762	2.131	0.147	0.017
	Lower-bound	0.762	1.000	0.762	2.131	0.147	0.017
Comm * GROUP	Sphericity Assumed	0.346	1.000	0.346	0.966	0.327	0.008
	Greenhouse-Geisser	0.346	1.000	0.346	0.966	0.327	0.008
	Huynh-Feldt	0.346	1.000	0.346	0.966	0.327	0.008
	Lower-bound	0.346	1.000	0.346	0.966	0.327	0.008
Error (Communication)	Sphericity Assumed	44.359	124	0.358			
	Greenhouse-Geisser	44.359	124.000	0.358			
	Huynh-Feldt	44.359	124.000	0.358			
	Lower-bound	44.359	124.000	0.358			

The results displayed in Table 9.29 show that there seems to be no significant difference in perception of communication in the company before and during the expatriation process. Consequently, there is no main effect for communication. Figure 9.7 and the descriptive statistics provided in Table 9.30 below suggest that there was a marginal decrease in the score of the control group, and a somewhat larger decrease in the score of the experimental group.

Table 9.30: Descriptive Statistics for Communication

4. GROUP * Communication					
GROUP	Communication	Mean	Std. Error	95% Confidence Interval	
				Lower Bound	Upper Bound
Experimental	1	3.364	0.065	3.236	3.492
	2	3.169	0.070	3.030	3.308
Control	1	3.119	0.091	2.938	3.300
	2	3.081	0.100	2.884	3.278

Figure 9.7: Change in Communication mean scores during expatriation phases



Pairwise comparisons reveal that the difference with regard to the experimental group was statistically significant even though practically small. The difference for the control group was not statistically significant.

Table 9.31: Pairwise comparisons between Communication scores of experimental group

Pairwise Comparisons ^b						
(I) Comm	(J) Comm	Mean Difference (I-J)	Std. Error	Sig. ^a	95% Confidence Interval for Difference ^a	
					Lower Bound	Upper Bound
1	2	0.195*	0.086	0.025	0.025	0.366
2	1	-0.195*	0.086	0.025	-0.366	-0.025
Based on estimated marginal means						
*. The mean difference is significant at the .05 level.						
a. Adjustment for multiple comparisons: Least Significant Difference (equivalent to no adjustments).						
b. GROUP = Experimental						

Table 9.32: Pairwise comparisons between Communication scores of control group

Pairwise Comparisons ^b						
(I) Comm	(J) Comm	Mean Difference (I-J)	Std. Error	Sig. ^a	95% Confidence Interval for Difference ^a	
					Lower Bound	Upper Bound
1	2	0.038	0.148	0.798	-0.260	0.337
2	1	-0.038	0.148	0.798	-0.337	0.260
Based on estimated marginal means						
a. Adjustment for multiple comparisons: Least Significant Difference (equivalent to no adjustments).						
b. GROUP = Control						

iii. Results for Job Satisfaction

Table 9.33 displays the results relating to Job Satisfaction.

Table 9.33: Factorial Anova for Job Satisfaction

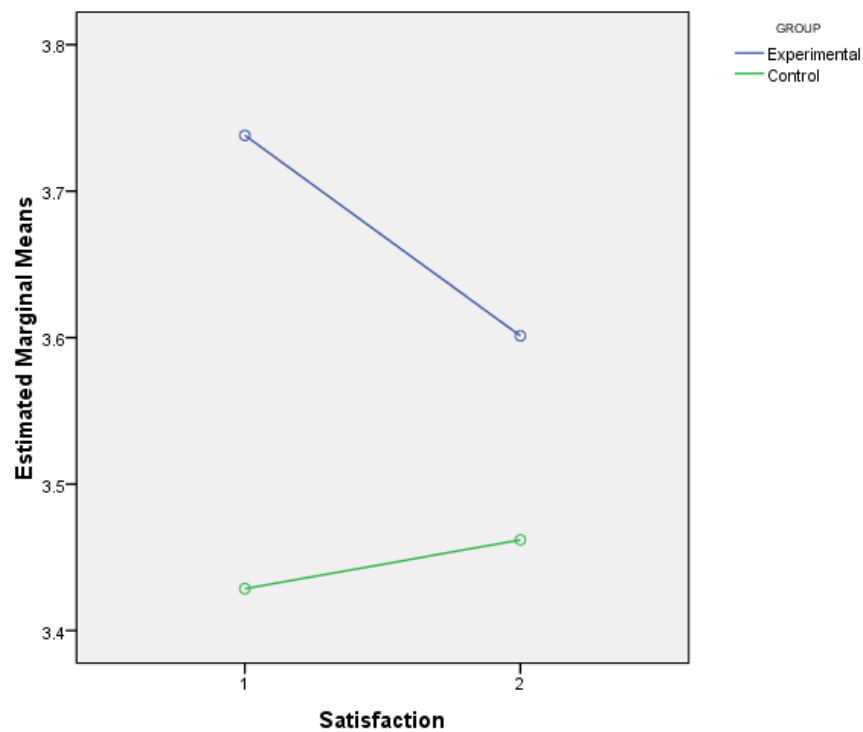
Tests of Within-Subjects Effects							
Source		Type III Sum of Squares	Df	Mean Square	F	Sig.	Partial Eta Squared
Satisfaction	Sphericity Assumed	0.150	1.000	0.150	0.820	0.367	0.007
	Greenhouse-Geisser	0.150	1.000	0.150	0.820	0.367	0.007
	Huynh-Feldt	0.150	1.000	0.150	0.820	0.367	0.007
	Lower-bound	0.150	1.000	0.150	0.820	0.367	0.007
Satisfaction * GROUP	Sphericity Assumed	0.406	1.000	0.406	2.216	0.139	0.018
	Greenhouse-Geisser	0.406	1.000	0.406	2.216	0.139	0.018
	Huynh-Feldt	0.406	1.000	0.406	2.216	0.139	0.018
	Lower-bound	0.406	1.000	0.406	2.216	0.139	0.018
Error (Satisfaction)	Sphericity Assumed	22.704	124	0.183			
	Greenhouse-Geisser	22.704	124.000	0.183			
	Huynh-Feldt	22.704	124.000	0.183			
	Lower-bound	22.704	124.000	0.183			

Results for the within subjects variables suggest that there was no significant difference in the perception of job satisfaction before and during expatriation. There was also no significant interaction between group membership and this perception. Figure 9.8 and the descriptive statistics indicated in Table 9.34 suggest that there was a marginal decrease in job satisfaction for the experimental group over time, while the control group showed a negligible increase.

Table 9.34: Descriptive statistics for Job Satisfaction

4. GROUP * Satisfaction					
GROUP	Job Satisfaction	Mean	Std. Error	95% Confidence Interval	
				Lower Bound	Upper Bound
Experimental	1	3.738	0.052	3.635	3.842
	2	3.601	0.052	3.498	3.705
Control	1	3.429	0.074	3.282	3.575
	2	3.462	0.074	3.315	3.608

Figure 9.8: Change in Job Satisfaction mean scores during expatriation phases



Pairwise comparisons as displayed in Tables 9.35 and 9.36 confirm that these differences were not statistically significant.

Table 9.35: Pairwise comparisons between Job Satisfaction scores of experimental group

Pairwise Comparisons ^b						
(I) Satisfaction	(J) Satisfaction	Mean Difference (I-J)	Std. Error	Sig. ^a	95% Confidence Interval for Difference ^a	
					Lower Bound	Upper Bound
1	2	0.137*	0.066	0.041	0.006	0.268
2	1	-0.137*	0.066	0.041	-0.268	-0.006
Based on estimated marginal means						
*. The mean difference is significant at the .05 level.						
a. Adjustment for multiple comparisons: Least Significant Difference (equivalent to no adjustments).						

Table 9.36: Pairwise comparisons between Job Satisfaction scores of control group

Pairwise Comparisons ^b						
(I) Satisfaction	(J) Satisfaction	Mean Difference (I-J)	Std. Error	Sig. ^a	95% Confidence Interval for Difference ^a	
					Lower Bound	Upper Bound
1	2	-0.033	0.094	0.725	-0.223	0.156
2	1	0.033	0.094	0.725	-0.156	0.223
Based on estimated marginal means						
a. Adjustment for multiple comparisons: Least Significant Difference (equivalent to no adjustments).						
b. GROUP = Control						

iv. Results for Tension

Table 9.37 displays the results relating to Tension.

Table 9.37: Factorial Anova for Tension

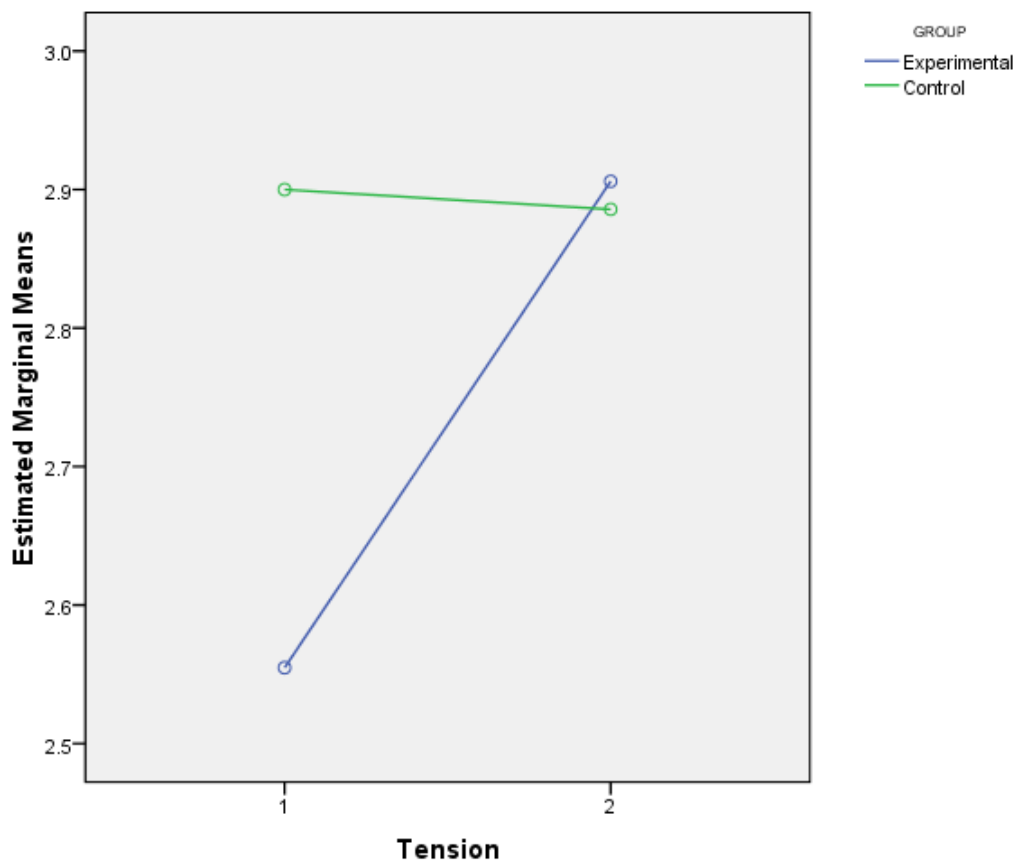
Tests of Within-Subjects Effects							
Source		Type III Sum of Squares	Df	Mean Square	F	Sig.	Partial Eta Squared
Tension	Sphericity Assumed	1.589	1.00	1.589	5.664	0.019	0.044
	Greenhouse-Geisser	1.589	1.000	1.589	5.664	0.019	0.044
	Huynh-Feldt	1.589	1.000	1.589	5.664	0.019	0.044
	Lower-bound	1.589	1.000	1.589	5.664	0.019	0.044
Tension * GROUP	Sphericity Assumed	1.870	1.000	1.870	6.665	0.011	0.051
	Greenhouse-Geisser	1.870	1.000	1.870	6.665	0.011	0.051
	Huynh-Feldt	1.870	1.000	1.870	6.665	0.011	0.051
	Lower-bound	1.870	1.000	1.870	6.665	0.011	0.051
Error (Tension)	Sphericity Assumed	34.791	124.000	0.281			
	Greenhouse-Geisser	34.791	124.000	0.281			
	Huynh-Feldt	34.791	124.000	0.281			
	Lower-bound	34.791	124.000	0.281			

Results of the comparison of means show that there were statistically significant differences between the two measures of tension, and that the interaction between group membership and the perception of tension was also significant. Figure 9.9 and the descriptive statistics provided in Table 9.38 confirm that the experimental group showed a clear increase in tension scores from the first to the second measurement, while the score of the control group did not show a meaningful change.

Table 9.38: Descriptive statistics for Tension

4. GROUP * Tension					
GROUP	Tension	Mean	Std. Error	95% Confidence Interval	
				Lower Bound	Upper Bound
Experimental	1	2.555	0.070	2.415	2.694
	2	2.906	0.071	2.766	3.046
Control	1	2.900	0.100	2.703	3.097
	2	2.886	0.100	2.687	3.084

Figure 9.9: Change in Tension mean scores during expatriation phases



Pairwise comparisons reported below in Tables 9.39 and 9.40 for the experimental and control groups respectively confirm that the movement was significant for the experimental group but not for the control group.

Table 9.39: Pairwise comparisons between Tension scores of experimental group

Pairwise Comparisons ^b						
(I) Tension	(J) Tension	Mean Difference (I-J)	Std. Error	Sig. ^a	95% Confidence Interval for Difference ^a	
					Lower Bound	Upper Bound
1	2	-0.351*	0.083	0.000	-0.516	-0.186
2	1	0.351*	0.083	0.000	0.186	0.516
Based on estimated marginal means						
*. The mean difference is significant at the .05 level.						
a. Adjustment for multiple comparisons: Least Significant Difference (equivalent to no adjustments).						
b. GROUP = Experimental						

Table 9.40: Pairwise comparisons between Tension scores of control group

Pairwise Comparisons ^b						
(I) Tension	(J) Tension	Mean Difference (I-J)	Std. Error	Sig. ^a	95% Confidence Interval for Difference ^a	
					Lower Bound	Upper Bound
1	2	0.014	0.112	0.899	-0.211	0.240
2	1	-0.014	0.112	0.899	-0.240	0.211
Based on estimated marginal means						
a. Adjustment for multiple comparisons: Least Significant Difference (equivalent to no adjustments).						
b. GROUP = Control						



v. Results for Propensity to Stay

The results relating to Propensity to Stay are provided in Table 9.41 below.

Table 9.41: Factorial Anova for Propensity to Stay

Tests of Within-Subjects Effects							
Source		Type III Sum of Squares	Df	Mean Square	F	Sig.	Partial Eta Squared
Propensity	Sphericity Assumed	0.372	1.000	0.372	1.241	0.267	0.010
	Greenhouse-Geisser	0.372	1.000	0.372	1.241	0.267	0.010
	Huynh-Feldt	0.372	1.000	0.372	1.241	0.267	0.010
	Lower-bound	0.372	1.000	0.372	1.241	0.267	0.010
Propensity * GROUP	Sphericity Assumed	1.004	1.000	1.004	3.347	0.070	0.026
	Greenhouse-Geisser	1.004	1.000	1.004	3.347	0.070	0.026
	Huynh-Feldt	1.004	1.000	1.004	3.347	0.070	0.026
	Lower-bound	1.004	1.000	1.004	3.347	0.070	0.026
Error (Propensity)	Sphericity Assumed	37.217	124.000	0.300			
	Greenhouse-Geisser	37.217	124.000	0.300			
	Huynh-Feldt	37.217	124.000	0.300			
	Lower-bound	37.217	124.000	0.300			

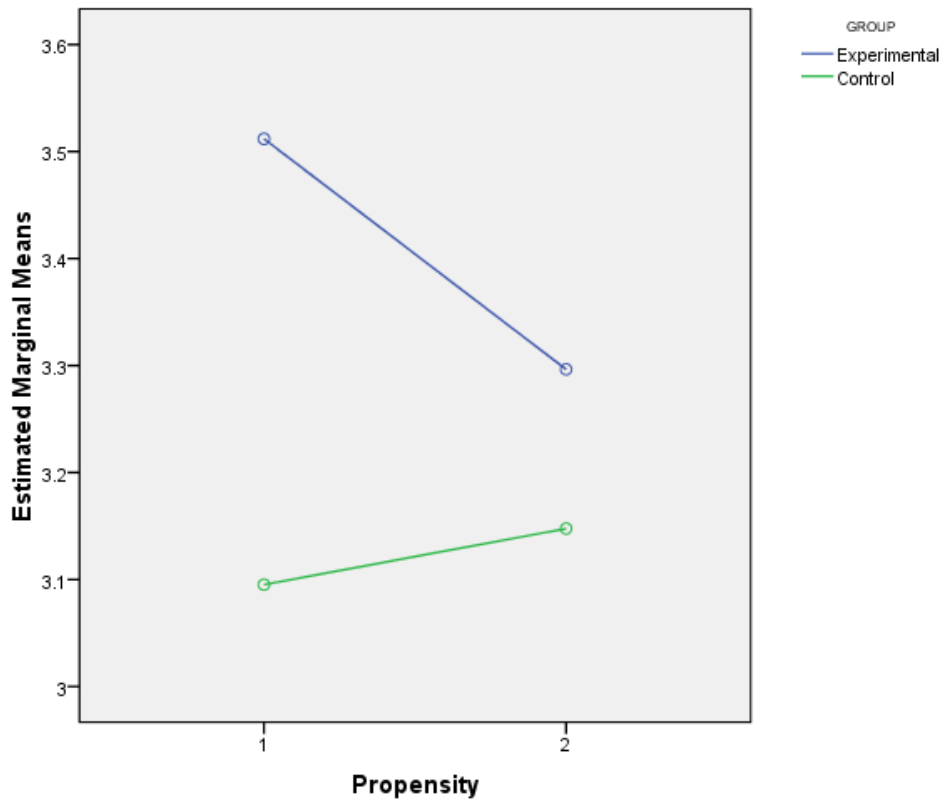
Results show that there was no main effect for Propensity to Stay and also no significant interaction between group membership and Propensity to Stay.

It becomes evident from Figure 9.10 and the descriptive statistics provided in Table 9.42 below that the scores of the experimental group decreased over time, while those of the control group showed a marginal increase.

Table 9.42: Descriptive statistics for Propensity to Stay

4. GROUP * Propensity					
GROUP	Propensity to Stay	Mean	Std. Error	95% Confidence Interval	
				Lower Bound	Upper Bound
Experimental	1	3.512	0.062	3.390	3.634
	2	3.296	0.061	3.176	3.417
Control	1	3.095	0.087	2.923	3.268
	2	3.148	0.086	2.977	3.318

Figure 9.10: Change in Propensity to Stay mean scores during expatriation phases



Results obtained from the Pairwise comparisons as indicated in Tables 9.43 and 9.44 reveal that the difference was indeed significant in the case of the experimental group but not the control group.

Table 9.43: Pairwise comparisons between Propensity to Stay scores of experimental group

Pairwise Comparisons ^b						
(I) Propensity to Stay	(J) Propensity to Stay	Mean Difference (I-J)	Std. Error	Sig. ^a	95% Confidence Interval for Difference ^a	
					Lower Bound	Upper Bound
1	2	0.215*	0.078	0.007	0.060	0.371
2	1	-0.215*	0.078	0.007	-0.371	-0.060
Based on estimated marginal means						
*. The mean difference is significant at the .05 level.						
a. Adjustment for multiple comparisons: Least Significant Difference (equivalent to no adjustments).						
b. GROUP = Experimental						

Table 9.44: Pairwise comparisons between Propensity to Stay scores of control group

Pairwise Comparisons ^b						
(I) Propensity to Stay	(J) Propensity to Stay	Mean Difference (I-J)	Std. Error	Sig. ^a	95% Confidence Interval for Difference ^a	
					Lower Bound	Upper Bound
1	2	-0.052	0.136	0.702	-0.327	0.222
2	1	0.052	0.136	0.702	-0.222	0.327
Based on estimated marginal means						
a. Adjustment for multiple comparisons: Least Significant Difference (equivalent to no adjustments).						
b. GROUP = Control						

vi. Results for Leadership

The results obtained for Leadership are displayed in Table 9.45.

Table 9.45: Factorial Anova for Leadership

Tests of Within-Subjects Effects							
Source		Type III Sum of Squares	Df	Mean Square	F	Sig.	Partial Eta Squared
Leadership	Sphericity Assumed	0.383	1.000	0.383	0.487	0.487	0.004
	Greenhouse-Geisser	0.383	1.000	0.383	0.487	0.487	0.004
	Huynh-Feldt	0.383	1.000	0.383	0.487	0.487	0.004
	Lower-bound	0.383	1.000	0.383	0.487	0.487	0.004
Leadership * GROUP	Sphericity Assumed	0.194	1.000	0.194	0.247	0.620	0.002
	Greenhouse-Geisser	0.194	1.000	0.194	0.247	0.620	0.002
	Huynh-Feldt	0.194	1.000	0.194	0.247	0.620	0.002
	Lower-bound	0.194	1.000	0.194	0.247	0.620	0.002
Error (Leadership)	Sphericity Assumed	97.660	124.000	0.788			
	Greenhouse-Geisser	97.660	124.000	0.788			
	Huynh-Feldt	97.660	124.000	0.788			
	Lower-bound	97.660	124.000	0.788			

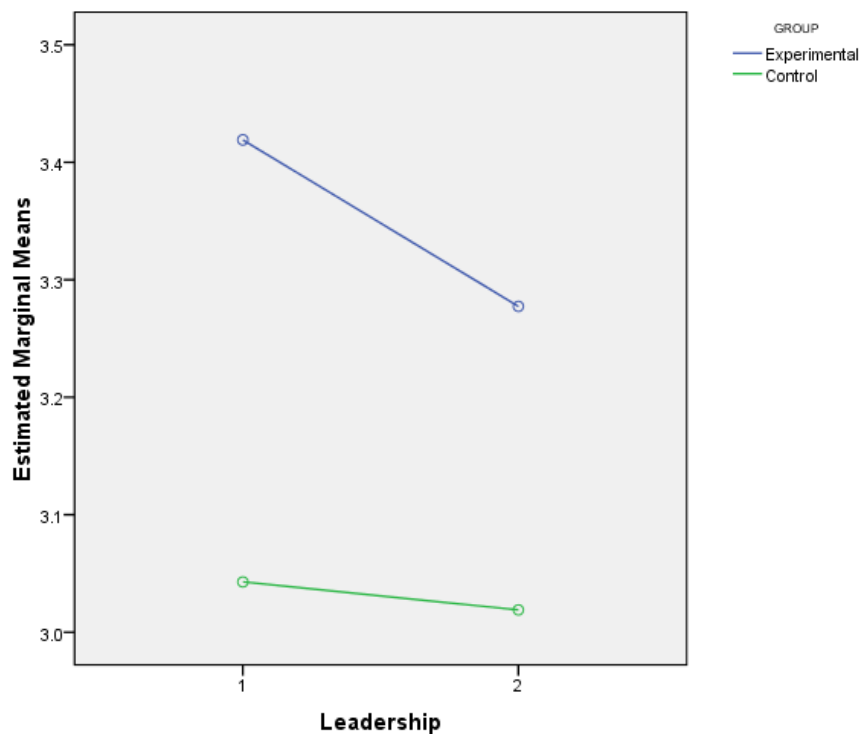
Results show that there were no significant differences in Leadership from the first to the second measure, and also no significant interaction between the variables.

Figure 9.11 and the descriptive statistics provided in Table 9.46 suggest that the mean scores for the experimental group decreased somewhat over time, while that of the control group remained fairly stable.

Table 9.46: Descriptive statistics for Leadership

4. GROUP * Leadership					
GROUP	Leadership	Mean	Std. Error	95% Confidence Interval	
				Lower Bound	Upper Bound
Experimental	1	3.419	0.106	3.209	3.629
	2	3.277	0.094	3.091	3.464
Control	1	3.043	0.150	2.745	3.340
	2	3.019	0.133	2.755	3.283

Figure 9.11: Change in Leadership mean scores during expatriation phases



Pairwise comparisons as indicated in Tables 9.47 and 9.48 however reveal that none of these differences were statistically significant or particularly large in effect.

Table 9.47: Pairwise comparisons between Leadership scores of experimental group

Pairwise Comparisons ^b						
(I) Leadership	(J) Leadership	Mean Difference (I-J)	Std. Error	Sig. ^a	95% Confidence Interval for Difference ^a	
					Lower Bound	Upper Bound
1	2	0.142	0.137	0.303	-0.130	0.413
2	1	-0.142	0.137	0.303	-0.413	0.130
Based on estimated marginal means						
a. Adjustment for multiple comparisons: Least Significant Difference (equivalent to no adjustments).						
b. GROUP = Experimental						

Table 9.48: Pairwise comparisons between Leadership scores of control group

Pairwise Comparisons ^b						
(I) Leadership	(J) Leadership	Mean Difference (I-J)	Std. Error	Sig. ^a	95% Confidence Interval for Difference ^a	
					Lower Bound	Upper Bound
1	2	0.024	0.195	0.903	-0.369	0.417
2	1	-0.024	0.195	0.903	-0.417	0.369
Based on estimated marginal means						
a. Adjustment for multiple comparisons: Least Significant Difference (equivalent to no adjustments).						
b. GROUP = Control						

9.5.2.4. Results for personality variables

The results of the 16PF independent samples T-test for the experimental and control groups before their departure on international assignment are presented in Table 9.49. The only factor for which the variances differed between the experimental and control groups was Factor A (Outgoing) ($F = 4.809$, $p = 0.030$). The adjusted t-values are also presented in Table 9.49.

Table 9.49: Independent samples T-test applied to the 16PF mean scores of the experimental group compared to the control group before expatriation

Factor	Experimental Group (N = 84)		Control Group (N = 42)		Levene's Test		df	T	p	Eta Squared
	Mean	SD	Mean	SD	F	P				
A	5.86	2.16	5.52	1.81	4.809	0.030*	96.170	0.911	0.364	0.009
C	7.11	1.52	5.55	1.70	1.641	0.203	124	5.215	0.000*	0.180
E	6.71	1.81	7.55	1.56	1.761	0.187	124	-2.541	0.012*	0.049
F	6.74	1.73	5.90	2.01	0.830	0.364	124	2.414	0.017*	0.045
G	5.33	1.71	6.07	1.44	2.147	0.145	124	-2.403	0.018*	0.044
H	7.57	2.06	6.74	1.82	3.136	0.079	124	2.226	0.028*	0.038
I	4.60	2.15	3.76	1.85	0.804	0.372	124	2.145	0.034*	0.036
L	4.31	2.01	5.10	2.34	0.413	0.522	124	-1.961	0.052	0.030
M	4.88	1.81	5.17	1.99	1.002	0.319	124	-.809	0.420	0.005
N	5.96	2.08	6.57	2.22	0.573	0.451	124	-1.510	0.134	0.018
O	3.24	1.56	4.36	1.79	1.789	0.183	124	-3.614	0.000*	0.095
Q1	7.07	1.68	6.81	1.90	1.107	0.295	124	0.790	0.431	0.005
Q2	3.73	2.13	4.33	2.38	1.645	0.202	124	-1.451	0.149	0.017
Q3	7.23	1.49	7.33	1.37	0.646	0.423	124	-0.390	0.697	0.001
Q4	4.23	1.74	4.43	1.71	0.396	0.530	124	-0.619	0.537	0.003
Extraver	6.54	1.18	5.89	1.20	0.096	0.757	124	2.867	0.005*	0.062
Anxiety	3.09	1.25	4.01	1.17	0.000	0.988	124	3.967	0.000*	0.113
Open	5.29	1.08	5.31	1.15	0.143	0.706	124	-0.095	0.925	0.000
Independ	6.77	1.07	6.90	1.19	0.839	0.362	124	-0.623	0.534	0.003
Control	5.81	.89	6.16	.96	0.762	0.384	124	-2.016	0.046*	0.032

* Significant at 0.05 level



With regard to the primary personality variables, significant differences were observed in the mean scores of the experimental and control groups on all 16PF factors except for Factors A, L, M, N, Q1, Q2, Q3 and Q4. However, the magnitude of the differences in the means was small, apart from factor O, which had a moderate effect size (eta squared = 0.095), and factor C, which had a large effect size (eta squared = 0.180).

In terms of the global personality factors, there was no significant difference between the experimental and the control groups on Openness and Independence. However, the experimental group scored significantly higher on Extraversion, and lower on Anxiety and Self-control. The magnitude of the differences in the means for Self Control was small (eta squared = 0.032), and effect size was moderate for Extraversion (eta squared = 0.062), and Anxiety (eta squared = 0.113). For a more detailed discussion on the above mentioned findings, refer to Paragraphs 10.5 and 10.6 in Chapter 10.

It is important to note that the experimental and control groups differ on almost all the assessed variables before departure on assignment, as it would be naïve to assume the equivalence of the experimental and control group without conducting pre-test comparisons.

Results of the independent samples T-test for the experimental group compared to the control group after six months on assignment in the foreign environment are presented in Table 9.17.

9.6. Relationships among different variables (correlations)

9.6.1. Introduction

Possible relationships existing among the variables included in the study will be investigated and discussed in this section by making use of Pearson's Product Moment Correlation Coefficient (r). These investigations will be conducted in order to achieve the following research objectives:



- Objective 2 set for this study was to establish the interaction that exists between the expatriate personality and the individual's emotional adjustment during the various phases of the expatriation process.
- Objective 3 was to establish the impact of organisational climate factors on the emotional adjustment of the individual prior to departure on the international assignment, and while on contract.
- Objective 4 aimed at establishing the nature of the interaction that exists between expatriate personality and the individual's perception of the organisational climate.

The results will be presented in the following sequence:

- The presentation and interpretation of the calculated correlations (Paragraphs 9.6.2 to 9.6.6);
- The relevance of the correlations to Research objectives 2, 3 and 4 can be found in Paragraphs 10.3 to 10.5 in Chapter 10.

9.6.2. Correlations between five global personality factors and other variables

The correlations among the emotional health, organisational climate, and global five personality factors are presented in Table 9.50.

Table 9.50: Correlations between emotional health and Climate variables versus global five personality factors

	Extraversion	Anxiety Proneness	Openness	Independence	Self- Control
SOC (B)	0.157	-0.142	0.113	-0.008	0.176
HARD (B)	0.152	-0.276*	0.178	0.025	0.023
Role (B)	0.063	-0.052	-0.105	-0.062	-0.108
Comm (B)	0.154	-0.011	-0.018	-0.114	-0.132
Sat (B)	0.105	0.055	0.024	0.029	0.058
Tense (B)	-0.105	0.003	-0.081	0.133	0.076
Prop (B)	0.048	0.057	-0.019	0.020	-0.166
Lead (B)	0.104	-0.091	0.032	-0.061	-0.197
SOC (D)	-0.028	-0.140	0.206	0.033	0.177
HARD (D)	0.060	-0.218*	-0.220*	0.008	0.134
Role (D)	0.032	0.083	0.102	-0.123	0.271*
Comm (D)	0.180	0.056	-0.026	-0.184	0.083
Sat (D)	-0.018	-0.05	0.095	0.152	0.088
Tense (D)	0.018	0.088	-0.123	-0.060	-0.002
Prop (D)	0.054	0.121	-0.034	0.033	0.128
Lead (D)	0.093	0.013	0.054	-0.042	0.021
SOC (A)	0.112	-0.140	0.036	0.176	0.067
HARD (A)	0.063	-0.035	-0.121	0.087	0.050

Note. * $p < 0.05$, ** $p < 0.01$.

As was discussed in Paragraph 8.7.5.1, correlations that are significant at the $p < 0.05$ are considered statistically significant. However, According to Cohen (1988) the following cut-off points in terms of the correlation coefficient are recognised as practically significant (independent of the direction of the relationship) as the sample size has a definite influence on the significance of the correlations:

- $r = 0.10$: small effect
- $r = 0.30$: medium effect
- $r = 0.50$: large effect

Within the framework of both practical and statistical significance, very few significant correlations were observed between the five global personality factors and the other variables included in the study.

Anxiety showed significant negative correlations with Hardiness, both before departure on assignment ($r = -0.276$), and after six months into the assignment ($r = -0.218$). Openness showed a significant negative correlation of -0.220 with Hardiness during assignment. A significant positive correlation was also found between Self-control and Role clarity during assignment ($r = 0.271$). However these correlations may be said to be small in effect.

9.6.3. Correlations between primary 16PF personality factors and other variables

A number of significant correlations could be identified between the primary 16PF factors and the emotional health and climate variables included in the research. Table 9.51 presents the correlations obtained during this study. The significant correlations obtained are highlighted in the table.

As was presented in Table 9.51, significant positive correlations were observed between Outgoing (Factor A) and Role clarity ($r = 0.290$), Communication ($r = 0.378$), and Leadership ($r = 0.227$) during assignment. Stability (Factor C) showed significant positive correlations with Sense of Coherence before departure ($r = 0.221$) and Hardiness before departure ($r = 0.235$). Assertiveness (Factor E) showed a positive correlation of 0.270 with Satisfaction during assignment, Enthusiasm (Factor F) showed a positive correlation of 0.225 with Sense of Coherence during assignment. However most of these are small in effect according to Cohen's (1988) guideline, with the exception of the correlation between the Outgoing factor and Communication which may be said to be medium in effect.

Of interest would be the significant negative correlations that Adventurous (Factor H) showed with Sense of Coherence during assignment ($r = -0.265$), Role clarity during assignment ($r = -0.279$), and Satisfaction during assignment ($r = -0.233$). Even though they are relatively small in effect, it does suggest a trend. The reasons for the negative correlation between Adventurous and these variables are unclear, as the expectation would be that the higher the levels of adventurousism displayed by the individual, the lower the amount of role clarification required by the individual during the conduct of his work as an expatriate. The adventurous person would also typically enjoy functioning in the unstructured and unpredictable expatriate environment and as a result, should tend to display higher levels of Sense of Coherence during assignment.

Table 9.51: Correlations between emotional health and Climate variables versus primary 16PF factors

	A	C	E	F	G	H	I	L	M	N	O	Q1	Q2	Q3	Q4
SOC (B)	0.133	0.221*	0.152	-0.032	0.141	0.055	-0.056	-0.066	0.034	0.134	0.094	0.077	-0.124	0.061	-0.219*
HARD (B)	0.080	0.235*	0.060	0.111	-0.055	0.074	-0.019	-0.198	0.023	-0.066	-0.033	0.065	-0.108	0.209	-0.242*
Role (B)	0.076	0.135	-0.181	0.032	0.064	0.015	0.183	-0.115	0.185	-0.056	-0.089	0.139	-0.202	-0.246*	-0.046
Comm (B)	0.138	0.138	-0.135	0.092	-0.053	0.072	0.092	0.022	0.011	-0.086	0.010	0.054	-0.238*	-0.126	-0.056
Sat (B)	0.126	-0.021	0.150	0.110	0.067	-0.028	-0.063	0.104	-0.067	0.119	-0.053	0.009	0.041	-0.108	-0.006
Tense (B)	-0.122	-0.157	-0.017	-0.132	0.016	0.032	0.046	-0.065	0.152	0.035	-0.035	0.174	0.063	0.111	0.074
Prop (B)	0.060	0.095	0.043	0.161	-0.130	-0.030	0.068	0.095	-0.086	-0.117	0.070	-0.120	0.073	-0.074	0.030
Lead (B)	0.111	0.166	-0.098	0.132	-0.018	0.090	0.125	-0.084	-0.078	-0.158	-0.077	0.062	-0.052	-0.218*	-0.167
SOC (D)	0.050	0.000	0.111	0.225*	0.031	-0.265*	-0.239*	-0.089	-0.114	0.195	-0.038	-0.057	0.147	0.105	-0.223*
Hard (D)	0.043	0.092	0.055	0.104	0.099	-0.085	-0.257*	-0.155	0.026	0.024	-0.123	0.118	-0.065	0.165	-0.186
Role (D)	0.290**	-0.097	0.087	0.018	0.032	-0.279*	-0.094	0.172	-0.314**	0.426**	0.020	-0.117	0.030	0.000	-0.035
Comm (D)	0.378**	-0.048	-0.119	0.129	0.048	-0.096	0.052	0.13	0.001	0.150	0.083	-0.127	-0.180	-0.073	-0.149
Sat (D)	0.075	-0.079	0.270*	0.055	0.024	-0.233*	-0.089	0.049	-0.020	0.065	-0.089	-0.029	0.175	0.086	-0.135
Tense (D)	-0.013	-0.092	-0.067	-0.072	0.062	0.142	0.141	0.022	0.023	-0.040	0.018	-0.012	-0.039	-0.021	0.141
Prop (D)	0.144	-0.164	0.163	0.006	0.083	-0.165	-0.058	0.159	-0.005	0.138	0.024	0.024	-0.012	0.01	0.047
Lead (D)	0.227*	-0.074	0.081	-0.093	0.076	-0.074	-0.095	0.087	-0.023	-0.056	0.001	0.012	-0.094	0.041	-0.088
SOC (A)	-0.004	0.128	0.107	-0.016	0.031	0.175	0.070	-0.086	0.127	0.174	-0.128	0.352**	-0.052	-0.122	-0.228*
Hard (A)	0.091	0.155	-0.062	-0.167	0.080	0.145	0.139	-0.081	0.280**	0.119	0.031	0.257*	-0.124	-0.142	-0.031

** Correlation is significant at the 0.01 level

* Correlation is significant at the 0.05 level



Sensitivity (Factor I) showed significant negative relationships with both Sense of Coherence ($r = -0.239$) and Hardiness ($r = -0.257$) during assignment. Imaginative (Factor M) correlated significantly and negatively with Role clarity during assignment ($r = -0.314$) and positively with Hardiness after completion of assignment ($r = 0.280$), while Shrewd (Factor N) showed a significant positive correlation of 0.426 with Role clarity during assignment.

Liberal (Factor Q1) correlated significantly and positively with both Sense of Coherence ($r = 0.352$) and Hardiness ($r = 0.257$) after completion of assignment while, Self-sufficient (Factor Q2) showed a significant negative correlation with Communication before assignment ($r = -0.238$). Control (Factor Q3) indicated a significant negative correlation with both Role clarity ($r = -0.246$) and Leadership ($r = -0.218$) before assignment.

Tension (Factor Q4) indicated significant negative correlations with Sense of Coherence before ($r = -0.219$), during ($r = -0.223$), and after completion of assignment ($r = -0.228$). Tension also correlated significantly and negatively with Hardiness before assignment ($r = -0.242$). Most of the correlations were small to medium in effect size (Cohen, 1988).

9.6.4. Correlations between emotional health and Climate variables

Table 9.52 provides a layout of the correlations between the emotional health and climate variables for the experimental group during the various phases of the expatriation process.

Table 9.52: Correlations between emotional health and Climate variables

Factors	SOC (B)	HARD (B)	SOC (D)	HARD (D)	SOC (A)	HARD (A)
SOC (B)	1	0.387**	0.307**	0.143	0.170	0.118
HARD (B)	0.387**	1	0.096	0.136	0.258*	0.180
Role (B)	0.172	0.160	-0.053	0.040	0.075	0.041
Comm (B)	0.247*	-0.019	0.138	0.304**	-0.040	-0.032
Sat (B)	0.181	-0.187	0.192	0.290**	0.017	-0.024
Tense (B)	-0.321**	-0.150	-0.299**	-0.214	-0.019	0.199
Stay (B)	0.055	0.013	0.271*	0.155	-0.006	-0.180
Lead (B)	0.129	0.008	0.214	0.208	0.036	-0.063
SOC (D)	0.307**	0.096	1	0.533**	0.014	-0.218*
HARD (D)	0.143	0.136	0.533**	1	0.099	-0.101
Role (D)	-0.018	-0.076	0.270*	0.067	-0.165	-0.243*
Comm (D)	0.206	0.164	0.254*	0.208	-0.035	0.016
Sat (D)	0.095	0.034	0.387**	0.317**	0.081	0.016
Tense (D)	-0.184	-0.151	-0.489**	-0.561**	-0.192	-0.007
Stay (D)	0.193	0.072	0.434**	0.248*	0.152	0.057
Lead (D)	0.206	0.112	0.397**	0.278*	-0.018	0.060
SOC (A)	0.170	0.258*	0.014	0.099	1	0.535**
HARD (A)	0.118	0.180	-0.218*	-0.101	0.535**	1

** Correlation is significant at the 0.01 level

* Correlation is significant at the 0.05 level

Sense of Coherence before assignment showed a significant positive correlation with Hardiness before assignment ($r = 0.387$), as well as with Communication ($r = 0.247$) and Tension before assignment ($r = -0.321$). Sense of Coherence before assignment also correlated significantly and positively with Sense of Coherence during assignment ($r = 0.307$). Sense of Coherence before assignment did not show any significant correlations with any of the other variables during and after completion of assignment.

Sense of Coherence during assignment showed significant correlations with all the Climate variables during assignment. It also correlated significantly with Tension ($r = -0.299$) and Propensity to Stay ($r = 0.271$) before assignment. A significant negative correlation of -0.218 was found between Sense of Coherence during assignment and Hardiness after completion of assignment.

Significant positive correlations were found between Hardiness during assignment and most of the Climate variables during assignment. The only exceptions were Role Clarity ($r = 0.067$) and Communication ($r = 0.208$) during assignment, where limited correlations could be detected. Hardiness during assignment also showed significant correlations with Communication ($r = 0.304$) and Satisfaction ($r = 0.290$) before assignment.

Sense of Coherence after completion of assignment correlated significantly and positively with Hardiness before departure ($r = 0.258$). A significant positive correlation of 0.535 was also found between Sense of Coherence and Hardiness after completion of assignment. Of interest would be the significant negative correlations obtained between Hardiness after completion of assignment and Sense of Coherence ($r = -0.218$) and Role clarity ($r = -0.243$) during assignment. Most of these correlations were small in effect with the exception of the 0.535 observable between Sense of Coherence and Hardiness after completion of assignment which may be said to have a large effect size (Cohen, 1988).

9.6.5. Correlations between Climate variables before and during assignment

The correlations obtained for the Climate variables before and during assignment are depicted in Table 9.53.

Most of the Climate variables before going on assignment correlated significantly with Tension during assignment. The two exceptions were Role clarity ($r = -0.106$) and Propensity to Stay ($r = 0.157$). No other significant correlations were found among the Climate variables before and during assignment.

Table 9.53: Correlations between Climate variables before versus during assignment

Factors	Role (D)	Comm (D)	Sat (D)	Tense (D)	Stay (D)	Lead (D)
Role (B)	-0.020	0.102	-0.084	-0.106	0.068	0.057
Comm (B)	-0.047	0.106	0.051	-0.345**	-0.055	0.007
Sat (B)	0.038	0.174	0.192	-0.264*	0.136	0.143
Tense (B)	-0.070	-0.164	-0.171	0.314**	-0.112	-0.169
Stay (B)	0.121	0.040	0.086	0.157	0.026	-0.059
Lead (B)	-0.088	-0.049	0.065	-0.305**	-0.214	-0.067

** Correlation is significant at the 0.01 level

* Correlation is significant at the 0.05 level

9.6.6. Correlations among Climate variables during assignment

The inter-correlations observed among the Climate variables during assignment for the experimental group are shown in Table 9.54.

Table 9.54: Correlations among Climate variables during assignment

Factors	Role (D)	Comm (D)	Sat (D)	Tense (D)	Stay (D)	Lead (D)
Role (D)	1					
Comm (D)	0.403**	1				
Sat (D)	0.236*	0.087	1			
Tense (D)	-0.096	-0.104	-0.437**	1		
Stay (D)	0.339**	0.386**	0.242*	-0.383**	1	
Lead (D)	0.257*	0.389**	0.196	-0.328**	0.628**	1

** Correlation is significant at the 0.01 level

* Correlation is significant at the 0.05 level

As was discussed in Paragraph 9.2.4.3, strong and significant positive correlations were identified among all of the selected Climate variables before departure on assignment. The average correlation obtained for all the Climate variables before departure was 0.49. This confirms the conclusion made that the six selected Climate factors may be assessing the same underlying organisational climate construct.

Although significant correlations were observed amongst most of the Climate variables while on assignment, these correlations seemed to be considerably lower compared to the correlations between the Climate variables before departure on assignment. The average correlation obtained among the Climate variables while on assignment was 0.30.

The following correlations were observed among the individual Climate during assignment variables: Role clarity during assignment showed significant correlations with almost all the other Climate during assignment variables. The only exception was Tension during assignment, where a correlation of only -0.096 was observed. Communication during assignment correlated significantly with Propensity to stay during assignment ($r = 0.386$) and Leadership during assignment ($r = 0.389$). Satisfaction during assignment also showed significant correlations with Tension during assignment ($r = -0.437$) and Propensity to stay during assignment ($r = 0.242$). Lastly, significant correlations were also observed between Tension during assignment and Propensity to stay during assignment ($r = -0.383$) and Leadership during assignment ($r = -0.328$). The correlations were mostly medium in effect size.

9.7. Regression analysis

In order to determine the nature of the predictive relationship between the expatriate's levels of emotional health, personality, and his perception of the organisational climate while on international assignment in a foreign country, a regression analysis was conducted and will be discussed in the following section.

9.7.1. Introduction

The results of the regression analysis conducted on the variables included in this study will be investigated and discussed in this section. The purpose of performing a regression analysis will be to achieve Objective 5: To investigate the main personality and organizational climate predictors of the expatriate's levels of emotional health while on an international assignment in a foreign country.

According to the expatriate adjustment model postulated in Chapter 1, both personality and Climate play a role in determining the expatriate's Sense of Coherence and Hardiness while on assignment. Herewith, an investigation of the results obtained during the regression analysis.

9.7.2. Climate during assignment as predictor of emotional health during assignment

The correlations discussed in Paragraph 9.6.4 indicated that Sense of Coherence was significantly related to all the Climate variables during assignment. A multiple regression analysis was conducted where all the Climate variables during assignment were entered as predictors of Sense of Coherence during assignment. The results indicated that the overall model was significant and verified [$F(6, 83) = 7.431, p = 0.000, R = 0.606$], and accounted for 36.7 percent of the variance in Sense of Coherence. However, Tension was the only significant predictor of Sense of Coherence. After removing the remaining variables, Tension explained 23.9 percent of the variance in Sense of Coherence during assignment [$F(1, 83) = 25.709, p = 0.000, R = 0.489$]. This corresponds with the correlation value reported in Table 9.52.

As discussed in Paragraph 9.6.4, Hardiness was significantly correlated with most of the Climate variables during assignment, excluding Role clarity and Communication. A multiple regression analysis was conducted with the Climate variables that were correlated with Hardiness during assignment as predictors. The results indicated that the overall model was significant [$F(4, 83) = 9.764, p = 0.000, R = 0.575$], and accounted for 33.1 percent of the variance in Hardiness scores. Again, Tension was the only significant predictor. After removing the remaining variables, Tension explained 31.4 percent of the variance in Hardiness during assignment [$F(1, 83) = 37.612, p = 0.000, R = 0.561$]. This corresponds with the correlation value reported in Table 9.52.



Looking at the correlations between Tension and the other Climate variables (see Table 9.9), strong and significant correlations were observed between Propensity to Stay, Satisfaction, and Tension. Therefore, the possibility exists that these variables in turn contribute to Tension while on assignment.

9.7.3. Personality as predictor of emotional health during assignment

As can be seen in Paragraph 9.6.3 of this chapter, Sense of Coherence during assignment was significantly correlated with Factors F (Enthusiastic), H (Adventurous), I (Sensitive), and Q4 (Tension) of the 16PF. A multiple regression analysis was conducted where these four personality factors were entered as predictors of Sense of Coherence during assignment. The results indicated that the overall model was significant [$F(4, 83) = 5.451, p = 0.001, R = 0.465$], and accounted for 17.7 percent of the variance in Sense of Coherence. However, Factors H and Q4 were the only significant predictors of Sense of Coherence. After removing Factors F and I, it was found that Factors H and Q4 together explained 17.2 percent of the variance in Sense of Coherence during assignment [$F(2, 83) = 8.394, p = 0.000, R = 0.414$].

The correlations reported in Paragraph 9.6.3 indicated that Hardiness was correlated only with Factor I of the 16PF. A linear regression analysis was conducted where Factor I was entered as a predictor of Hardiness during assignment. The results indicated that the overall model was significant [$F(1, 83) = 5.791, p = 0.018, R = 0.257$], and accounted for 6.6 percent of the variance in Hardiness. Even though the overall model is significant, the percentage variance explained is almost negligible and it is clear that there are other predictors of Hardiness more significant than personality traits.

9.8. Summary

The results of the research methods described in Chapter 8 were presented in Chapter 9. Detailed discussions are conducted in Chapter 10 on the extent to which the results obtained from the statistical analyses confirm the research objectives that were set for the study.

Chapter 10

Discussion

10.1. Introduction

In Chapter 10 a discussion is conducted on the extent to which the above mentioned research objectives were met. This discussion is based on the results obtained from the statistical analyses conducted as laid out in Chapter 9.

The aim of the study is to determine whether relationships exist between the expatriate's levels of emotional health, personality, and his perception of the organisational climate while on international assignment, and to present the outcome of the study as a model. In achieving this aim, the following research objectives were set:

- Objective 1:
To establish the impact of the expatriation process on the individual's emotional health;
- Objective 2:
To establish the interaction that exists between the expatriate personality and the individual's emotional adjustment during the various phases of the expatriation process.
- Objective 3:
To establish the impact of organisational climate factors on the emotional adjustment of the individual prior to departure on the international assignment, and while on contract.
- Objective 4:
To establish the nature of the interaction that exists between expatriate personality and the individual's perception of the organisational climate.
- Objective 5:
To investigate the main personality and organisational climate predictors of the expatriate's levels of emotional health while on an international assignment in a foreign country.



10.2. Discussion of Objective 1: Impact of expatriation process on emotional health

The first objective set in this study was to establish the impact of the expatriation process on the individual's emotional health. It was proposed that the emotional health of the individual expatriate is directly and significantly influenced during the three phases of the international career cycle. In discussing Objective 1, the following hypotheses were investigated and will be discussed:

10.2.1. Discussion of Hypothesis 1a: The expatriate's sense of coherence decreases from before assignment to six months into the assignment

The first hypothesis was that the expatriate's sense of meaning decreases from prior to assignment to six months into the assignment. This hypothesis was tested by comparing the Sense of Coherence mean score of the experimental group before departure with their Sense of Coherence mean scores after six months on assignment.

The pre-departure Sense of Coherence mean score of the experimental group was found to be significantly higher than their Sense of Coherence mean score six months after arrival in the foreign country. This difference in mean scores indicates that the subjects included in the experimental group experienced a decrease in their emotional health as measured on the Sense of Coherence Scale before their departure on assignment.

The experimental group's Sense of Coherence mean score before departure was compared with that of the control group. The experimental group scored significantly higher than the control group on Sense of Coherence before departure. In isolation, this difference may be interpreted as indicating that the levels of emotional health experienced by the experimental group as assessed on the Sense of Coherence Scale before departure on assignment were significantly higher compared to those of the control group. However, it is important to note that the responses of both the experimental and control groups to the individual items included in the Sense of Coherence Scale were negatively skewed. This skewness indicates that the respondents tended to endorse the higher categories on the Scale.



Significant differences were also observed when the Sense of Coherence mean scores of the experimental and control groups were compared after six months on assignment. However, on this occasion the experimental group reported a significantly lower mean score than the control group. This outcome stands in contrast to the result obtained before departure on assignment, where the experimental group's Sense of Coherence mean score was found to be significantly higher than that of the control group.

No significant differences could be detected in the Sense of Coherence mean scores of the control group before departure and after six months on assignment. These results indicate that the control group did not experience any significant change in their levels of emotional health as assessed on the Sense of Coherence Scale during the various phases of the international career cycle to which the experimental group was exposed to.

The above mentioned discussion confirms the hypothesis that the expatriate's sense of meaning decreases from prior to assignment to six months into the assignment. The findings are in line with Antonovsky's (1993) assertion that a radical change in one's structural external situation can lead to a significant modification in one's emotional health. Antonovsky specifically highlights emigration to a foreign country (which refers to expatriation) as an example of a radical change in the individual's cultural or structural living conditions that can lead to a significant change in the sense of coherence.

10.2.2. Discussion of Hypothesis 1b: The expatriate's sense of coherence decreases from six months into assignment to after completion of assignment

Hypothesis 1b specified that the individual's sense of meaning decreases from six months into the assignment to after completion of assignment. This hypothesis was tested by comparing the experimental group's Sense of Coherence mean score during assignment with their Sense of Coherence mean score after completion of their assignments.



The Sense of Coherence mean score of the experimental group decreased significantly from six months on assignment to after returning from assignment. These results indicate that the levels of emotional health experienced by the experimental group, as evaluated on the Sense of Coherence Scale, decrease even more compared to their already lowered levels of emotional health when assessed after six months on assignment.

When the Sense of Coherence mean scores of the experimental and control groups were compared with each other after completion of the international assignments, a significant difference was observed. The experimental group scored significantly lower than the control group.

No significant differences in the Sense of Coherence mean scores of the control group during the equivalent phases could be detected, which indicates that the levels of emotional health of the control group as assessed on the Sense of Coherence Scale remained consistent during this period.

The above mentioned discussions confirm the hypothesis that the individual's sense of meaning decreases from six months into the assignment to after completion of assignment. These results confirm the findings of the literature study conducted in Paragraph 6.3, which indicate that the expatriate may tend to experience the repatriation process back into the home country as the most challenging aspect of the entire international assignment. This adjustment is even more severe than their initial adjustment to the foreign country on their arrival as expatriates (Stanoch, 2006; Beaverstock, 2000; Chan, 1999).

10.2.3. Discussion of Hypothesis 1c: The expatriate's hardiness decreases from prior to assignment to six months into the assignment

Hypothesis 1c stated that the expatriate's hardiness decreases from prior to assignment to six months into the assignment.

The first step in testing this hypothesis was to compare the Hardiness mean score of experimental group before departure with their Hardiness mean scores after six months on assignment. The pre-departure Hardiness mean score of the experimental group was found to be significantly higher than their mean scores obtained six months after arrival in the foreign country.



The experimental group's Hardiness mean score before departure was also compared with that of the control group. The experimental group scored significantly higher than the control group. Further analysis indicated that the responses of both the experimental and control groups to the individual items included in the Hardiness Scale were negatively skewed, and that the respondents tended to endorse the higher categories on the Scale. The inference can therefore be made that the Hardiness scores of the respondents included in the experimental group may have been positively influenced by their eagerness to be appointed in the available expatriate positions.

When the Hardiness mean scores of the experimental and control groups after six months were compared with each other, no significant differences could be detected. The experimental group scored slightly higher than the control group.

No significant differences were observed in the control group's Hardiness mean scores before departure on assignment when compared with their mean scores six months after arrival on assignment, which indicates that the levels of emotional health of the control group as assessed on the Hardiness Scale remained constant during this period.

The above mentioned discussions verify the hypothesis which states that the expatriate's hardiness decreases from prior to assignment to six months into the assignment.

In line with the above mentioned findings, Kaplan and Sadock (1991: 546) indicate that, where an individual is exposed to rapid cultural changes it could lead to an increase in the person's vulnerability to life strain. On the Diagnostic and Statistical Manual of Mental Disorders (DSM-III-R) (Kaplan and Sadock, 1991: 224), expatriation and reallocating to a foreign country or culture is allocated a rating of four on a six point scale, which represents severe stress. This provides further proof that the individual expatriate is exposed to severe levels of psychosocial stress during his relocation into the foreign country, which could potentially lead to the person experiencing symptoms of emotional fatigue. Kaplan and Sadock (1991) also refer to this problem as culture shock, which occurs when an individual is suddenly forced into an alien culture.



A study conducted by the United Kingdom Centre for International Briefing (Marx: 1999) found that expatriates included in the study experienced symptoms of culture shock for approximately seven weeks: 70 percent of the expatriates indicated that these symptoms continued for up to five weeks, and 30 percent of them experienced symptoms for up to ten weeks. Similarly, research conducted by Tung (as cited in Beaverstock, 2000) showed that approximately 30 percent of the expatriates sent on international assignments required between six and twelve months to adjust to the environment in the foreign country.

10.2.4. Discussion of Hypothesis 1d: The expatriate's hardiness decreases from six months into the assignment to after completion of the assignment

Hypothesis 1d stated that the expatriate's hardiness decreases from six months into the assignment to after completion of their assignments. This hypothesis was tested by comparing the Hardiness mean score of the experimental group after six months on assignment with their Hardiness mean score after completion of their assignments.

As became evident in Paragraph 9.5.2.2, the Hardiness mean score of the experimental group decreased significantly from six months on assignment to after returning from assignment. This indicates that the subjects included in the experimental group experienced a significant decrease in their levels of emotional health as assessed on the Hardiness Scale during the period from six months on assignment to after returning to their home country on completion of their international assignments.

The Hardiness mean scores of the experimental and control groups were compared with each other after completion of their assignments. No significant difference could be detected in the Hardiness mean scores of the two groups after the return of the experimental group from their international assignments. No significant changes could also be detected in the Hardiness mean scores of the control group when their responses six months after arrival on assignment were compared with their results after completion of experimental group's assignments.

The above mentioned discussions substantiate Hypothesis 1d which states that the expatriate's hardiness decreases from six months into the assignment to after completion of assignment. Of interest in this regard would be a commentary made by Trompenaars and Hampton-Turner (2004: 331), who indicate that the more successful the expatriate is in adjusting and integrating him or herself into the foreign country, the bigger the possibility that he may experience significant adjustment challenges during the repatriation process back to the home country.

10.2.5. Summary

The findings obtained during the analysis of Objective 1 confirm the postulate that the emotional health of the individual expatriate is directly and significantly influenced during the three phases of the international career cycle. These findings are also in line with the discussions conducted in Chapters 5, 6, and 7 of this study, which clearly specified three distinct phases in the international career cycle (Brotchi & Engvig, 2006), namely recruitment and selection, the actual period abroad, and repatriation or transfer.

The results also confirm the occurrence of two major transitions required by expatriates in remaining productive and emotionally healthy during their completion of the international assignment, namely cross-cultural entry and home country re-entry (Chan, 1999). Each of these transitions was proven to have a significant impact on the emotional health of the expatriate as assessed on the Sense of Coherence and Hardiness Scales.

10.3. Discussion of Objective 2: The relationship between expatriate personality traits and emotional adjustment

The second objective set during this study is to establish the interaction that exists between the expatriate personality and the individual's emotional adjustment during the various phases of the expatriation process. In achieving this objective, it was proposed that a direct correlation exists between the individual's personality traits and the individual's emotional adjustment during the assignment. The following hypotheses will now be discussed within the framework of the statistical analyses conducted.



10.3.1. Discussion of Hypothesis 2a: Specific personality traits correlate with sense of coherence during assignment

Hypothesis 2a specified that individual personality traits correlate with Sense of Coherence during assignment. An investigation was conducted in order to identify the significant correlations between the 16PF factors (both global and primary 16PF factors) and the Sense of Coherence mean score of the experimental group before departure and after six months on assignment.

10.3.1.1. Correlations between global personality factors and Sense of Coherence

No significant correlations could be identified between any of the five global personality factors and Sense of Coherence before departure, after six months on assignment, or on return after completion of assignment. These results are in contrast to the findings of Van der Bank and Rothmann (2002) and Caligiuri (2000), who indicate that the big five personality factors can be utilised to predict expatriate performance (for more information see Paragraph 7.7).

Similarly, Guthrie and Ash (2003) also indicate that expatriates who are more extroverted, receptive (low tough mindedness), accommodating (low independence) are more likely to successfully integrate themselves into the foreign environment, and less likely to report a desire to terminate their assignment prematurely. According to Guthrie and Ash (2003), those individuals who are assessed as being more emotionally stable (low on anxiety proneness) and who display relatively high levels of self-control are more likely to perform effectively from a work perspective.

However, Karson et al (1997) indicate that a major disadvantage of using the global scores of the 16PF in analysing individual personality is that they can conceal important elements in a personality. In agreement with Karson, the Institute for Personality and Ability Testing (2007) also cautions that the more specific primary factors of the 16PF should be incorporated when personality assessment is conducted for the purposes of detailed feedback or the prediction of future individual behaviour. According to the Institute (2007), research has shown that more specific factors such as the 16PF primary scales tend to predict actual behaviour better than the global five personality factors.

10.3.1.2. Correlations between primary 16PF factors and Sense of Coherence

Consequently, correlations were also investigated between the primary 16PF personality factors and the Sense of Coherence mean score of the experimental group before departure and after six months on assignment.

Stable (Factor C) showed a significant positive correlation with Sense of Coherence before departure ($r = 0.221$). Cattell et al (1988) defines Stable as the extent to which an individual is emotionally mature and able to remain consistent in managing mood swings in his emotional life, especially when placed in “difficult situations”.

Antonovsky (1991) asserts that a person’s ability to cope with stress is determined to a significant extent by Sense of Coherence, which he refers to as a specific individual psychological factor that determines his general attitude toward the world and his own life.

As can be seen from the above mentioned definitions, the Stable personality factor and Sense of Coherence seem to be measuring similar psychological constructs of emotional health.

Enthusiasm (Factor F) showed a significant positive correlation of 0.225 with Sense of Coherence during assignment. Factor F measures a person’s natural enthusiasm or energy levels (Cattell, 2006). As was discussed in Chapter 6, the expatriate is to a large extent required to create order and organisation in a highly flexible and constantly changing work environment where there are limited processes and guidelines in place to guide his actions and decisions. It can therefore be expected that individuals who score higher on Enthusiasm should probably be more able and willing to adjust to the flexible environment as compared to their more serious counterparts who score lower on Enthusiastic. As a result, the possibility exists that the person scoring higher on enthusiasm would potentially enjoy functioning in the confusing environment, which in turn, will have a positive impact on the levels of emotional health experienced by the person as assessed on the Sense of Coherence Scale while on assignment.

Also of relevance is the significant negative correlations that Adventurous (Factor H) showed with Sense of Coherence during assignment ($r = -0.265$). The reasons for the negative correlation between these two variables are unclear as the expectation would be that the more adventurous person would also enjoy functioning in the typically unstructured and unpredictable expatriate environment and as a result, should tend to display higher levels of Sense of Coherence during assignment.

Taking into account the relatively small sample of 84 subjects included in the experimental group, some caution may need to be exercised on the correlation obtained between Adventurous and Sense of Coherence.

Sensitivity (Factor I) showed a significant negative correlation with Sense of Coherence during assignment ($r = -0, 239$). Cattell et al (1988; 2007) define Sensitivity as the extent to which the individual is emotionally sensitive, empathetic, aware of feelings, and prone to make decisions based on personal values or the needs of others.

As an expatriate, the individual is required to take quick and decisive actions in dealing with constant operational demands and problems that require immediate attention (please see Paragraph 5.5.2 in Chapter 5 for a more detailed discussion). In the process, the individual is often not afforded the opportunity to focus on the softer human aspects involved. As a result of the time constraints and high demands being placed on the individual, the person who is able to make a quick analysis of the problems at hand and take appropriately decisive action will also probably see quicker progress in the achievement of his results and targets. This in turn could potentially lead to an increase in the person's perceived levels of personal achievement and emotional health as assessed on the Sense of Coherence Scale.

Liberal (Factor Q1) correlated positively with Sense of Coherence ($r = 0.352$) after completion of assignment. Cattell et al (1988) assert that Factor Q1 concerns the individual's orientation to change, novelty, and innovation. According to Cattell et al, an individual scoring high on Factor Q1 likes functioning in a constantly changing environment.

Antonovsky (1991) argues that the individual who has a high sense of coherence should be able to cope better with the pressures associated with significant life changing events, compared to the individual with a weak sense of coherence who may tend to become overwhelmed and paralysed by the pressure being placed on him or her.

Most of the expatriates included in the experimental group were employed on a contractual basis while on international assignment. Their contracts did not stipulate any guarantee of employment on their return to South Africa. As a result, they were unemployed on their return to South Africa after completing their international assignments. They therefore needed to search for new employment in South Africa or as expatriates in other countries. Taking into account the above mentioned observations, the inference can be made that Factor Q1 (Liberal) and Sense of Coherence can have a positive impact on each other.

Tension (Factor Q4) indicated negative correlations with Sense of Coherence before departure on assignment ($r = -0.219$), after six months on assignment ($r = -0.223$), as well as on return after completion of assignment ($r = -0.228$). Cattell et al (1988) view Tension as the level of physical tension experienced by the individual as expressed by irritability and impatience with others. An individual scoring high on Tension may tend to manifest signs of becoming irrationally worried, tense, irritable, anxious, and in turmoil. According to Cattell et al (1988: 108), a person indicating abnormally high levels of Tension may also show a higher probability of experiencing manic depression.

Antonovsky (1991) states that sense of coherence acts as a facilitator in the individual's ability to cope with highly stressful situations. This assertion is confirmed by research conducted by Anderzen and Arnetz (1999), who found that individuals who perceive themselves as having low sense of coherence are more likely to experience psycho-physiological stress and symptoms of depression. The individual is required to deal with substantial levels of stress and emotional turmoil during each of the adjustment phases in the expatriate career cycle (please find a more detailed discussion in this regard in Chapters 4, 5, and 6). It is expected that the more relaxed and emotionally calm the expatriate is (low on Tension), the better able he should be to cope with the demands being placed on him or her. This lower level of tension will in turn have a positive impact on the person's experienced levels of emotional health as assessed on the Sense of Coherence Scale.



10.3.2. Discussion of Hypothesis 2b: Specific personality traits correlate with hardiness during assignment

The hypothesis was set that individual personality traits are correlated with Hardiness during the assignment. This hypothesis was tested by investigating correlations between the five global personality factors and the Hardiness mean score of the experimental group before departure, after six months of assignment, and on completion of assignment.

10.3.2.1. Correlations between global personality factors and Hardiness

Herewith, a discussion on the correlations calculated between the global personality factors and the Hardiness mean score of the experimental group before departure, after six months of assignment, and on return after completion of assignment.

Anxiety proneness showed significant negative correlations with Hardiness, both before departure on assignment ($r = -0.276$), and after six months into the assignment ($r = -0.218$). Anxiety proneness refers to a person's tendency towards experiencing neuroticism, anxiety, hostility, vulnerability, and to experience negative emotions in response to their environment (Institute for Personality and Ability Testing, 2007). The opposite of Anxiety proneness is Stability, which refers to a person's emotional stability, and the general tendency to experience negative emotions in response to their environment (Institute for Personality and Ability Testing, 2007).

Kobasa (1982) conceptualises hardiness as a general health promoting factor that enables individuals to remain healthy at both a psychological and a physical level, despite being confronted with stressful situations or experiences. Kobasa is of the opinion that it is the personality trait of hardiness that leads people to respond differently to objectively identical stressors and stressful situations. According to Kobasa, the characteristics of the hardy personality reflect one's ability to successfully cope in stressful situations by means of a thorough appraisal of the situation or problem in the context of one's social environment and one's existing social support system.

Taking into account the similarities observed between the constructs, a negative relationship between Anxiety proneness and Hardiness (both before and during assignment) can therefore be expected.

Openness showed a statistically significant (though small) negative correlation of -0.220 with Hardiness during assignment. The opposite of Openness is referred to as Tough mindedness. The Tough mindedness construct focuses on the person's preference for concrete realities and facts versus abstract ideas and possibilities (Institute for Personality and Ability Testing, 2007). A typical attribute associated with high Tough mindedness would be "*a readiness to handle problems at a cognitive and objective level*" (Cattell et al, 1988: 119).

According to Kobasa (1982), the hardiness concept underlies the individual's ability and willingness to effectively deal with change. Maddi and Koshaba (2006) indicate that employees indicating high levels of hardiness tend to take the lead in situations of change because they possess key attitudes that motivate practical, constructive, and performance enhancing problem solving.

In their descriptions of the two constructs, both Cattell et al (1988) and Kobasa (1982) emphasise the importance of the individual making use of a practical problem solving approach in dealing with the problems facing him or her. Taking into account the descriptions provided for the two constructs, it becomes evident that Tough mindedness and Hardiness could potentially be two similar constructs evaluating the person's perception and approach towards dealing with problems and demands facing him in the external environment.

10.3.2.2. Correlations between primary 16PF factors and Hardiness

Herewith, a discussion on the correlations emerging between the primary 16PF personality factors and the Hardiness mean score of the experimental group before departure, after six months of assignment, and on return after completion of assignment.



Stability (Factor C) showed significant positive correlations with Hardiness before departure on assignment ($r = 0.235$). As discussed earlier, Stability (Factor C) refers to the expatriate's levels of maturity in coping with emotionally stressful situations. Taking into account the significant positive correlations observed between Sense of Coherence and Hardiness before assignment ($r = 0.381$), as well between Sense of Coherence and Hardiness during assignment ($r = 0.533$), the inference can be made that the two constructs are assessing similar constructs of emotional health. Therefore, the comments made relating to the correlations between Stability and Sense of Coherence in the previous section will be equally applicable to the strong correlations obtained between Stability and Hardiness before assignment.

Sensitivity (Factor I) showed a significant negative relationship with Hardiness ($r = -0.257$) during assignment. Individuals scoring high on Sensitivity tend to be more emotionally sensitive, and are prone to make decisions based on a more personal or subjective basis. On the other hand, individuals scoring low on Sensitivity tend to be more objective, unsentimental, tough minded, and self-reliant in their decision making (Cattell et al, 1988).

According to Kobasa et al (1988), the characteristics of the hardy personality reflect one's ability to successfully cope in stressful situations by means of a thorough and logical appraisal of the situation or problem in the context of one's social environment and one's existing social support system.

As was discussed in Paragraphs 5.4.1 and 5.5.2 in Chapter 5, the expatriate is required to function in an operationally demanding work environment where he is required to take quick, decisive action in dealing with problems. Therefore, expatriates who are more objective, unsentimental, tough minded, and self-reliant in their decision making (low on Sensitivity) are more likely to adjust to the demanding environment compared to their more sensitive counterparts. As a result, they should also indicate higher levels of emotional health, as reflected in the significant negative correlation between Sensitivity and Hardiness.



Imaginative (Factor M) correlated negatively with Hardiness after completion of assignment ($r = -0.280$). Factor M refers to the individual's inclination towards practicality versus creativity. According to Cattell et al (1988), individuals who score themselves highly on Imaginative are typically viewed as being creative, imaginative, and insightful. In the process, they may tend to overlook specific details and may also lack practicality. Low scorers on Imaginative prefer making decisions on a factual basis, and tend to focus on the directly observable operational results.

Taking into account the operationally challenging work environment within which the expatriate is required to function, the practical problem solving expatriate who focuses on the here-and-now results and outcomes (scoring low on Imaginative) should be better able to adjust to the work-related demands being placed on him or her. As a result, it can be expected that this person will also be indicating higher levels of emotional health as reflected in the significantly negative relationship observed between Hardiness and Imaginative.

Liberal (Factor Q1) correlated significantly and positively with Hardiness ($r = 0.257$) after completion of assignment. In Paragraph 9.6.7.1 a detailed discussion was conducted on the significant positive correlation ($r = 0.352$) that emerged between Factor Q1 and Sense of Coherence after completion of assignment. It was concluded that the person who prefers functioning in a constantly changing environment should be able to adjust more effectively to the unpredictable circumstances associated with being unemployed and having to search for a new job after completing an international assignment. Taking into account the significant positive correlation ($r = 0.535$) that emerged between Hardiness and Sense of Coherence after completion of assignment, the same conclusion can be obtained in explaining the positive relationship between Factor Q1 and Hardiness after completion of assignment.

Tension (Factor Q4) correlated negatively with Hardiness before assignment ($r = -0.242$). Factor Q4 refers to the individual's level of patience when required to deal with delays, stresses, and demands from the external environment. Individuals indicating very high levels of tension may tend to display signs of impatience, stress, and irritability. According to Cattell et al (1988: 109), a high score on Factor Q4 has the largest association with clinical depression among all the 16PF factors.



A study conducted by Harrisson et al (2002) found that a high level of hardiness is related to lower psychological distress and a more positive appraisal of the work environment. In their study, they found that those individuals who indicated higher levels of hardiness viewed themselves as able to influence life events by perceiving them as challenging rather than threatening. Those individuals also reported fewer symptoms of depression, anxiety, and anger.

Taking into account the above mentioned observations, it is viewed appropriate for Factor Q4 to show a negative correlation with Hardiness before departure on assignment, especially taking into account that the two variables were assessed at the same time.

10.3.2.3. Summary

The above mentioned findings and discussions indicate that a correlation exists between a considerable number of the individual's personality traits and the individual's emotional adjustment during the assignment as assessed on the Sense of Coherence and Hardiness Scales. The findings also confirm the postulate made that a direct positive correlation exists between the expatriate's personality traits and his emotional health during the assignment.

However, the small number of correlations observed among the global five personality factors and the Sense of Coherence and Hardiness variables also highlight the danger of only utilising the global five factors of personality, without taking into consideration the more specific personality traits as assessed more directly on the primary 16PF factors. These findings support the assertion made by Karson et al (1997: 77) that an individual's score on a global factor does not provide as much information compared to the scores on its component factors. In this regard, Karson et al (1997: 77) recommend that a more detailed diagnostic investigation needs to be conducted on the available individual personality components when assessing expatriates, as opposed to only utilising a mechanistic approach by focusing only on the person's results on the five global factors.



10.4. Discussion of Objective 3: The relationship between Climate factors on expatriate emotional adjustment prior to departure and after six months on assignment

The third objective set in this study was to establish the impact of organisational climate factors on the emotional adjustment of the expatriate prior to departure on the international assignment, and after six months on assignment.

In line with the above mentioned objective, the third postulate set in this research is that there is a significant correlation between organisational climate prior to and during the international assignment and the levels of emotional health experienced by the expatriate.

10.4.1. Discussion of Hypothesis 3a: Organisational climate before assignment is correlated with Sense of Coherence before assignment

The hypothesis was set that organisational climate before assignment is correlated with Sense of Coherence before assignment. This hypothesis was tested by identifying the correlations between the Climate variables and the Sense of Coherence mean score of the experimental group before departure on assignment.

Sense of Coherence before assignment showed a significant positive correlation ($r = 0.247$) with Communication before assignment. Kossuth (1998) defines Communication as the extent to which the person is able to obtain the information necessary to do his job properly, as well as the extent to which both upward and downward communication exists in the workplace.

The positive relationship found between Sense of Coherence and Communication before assignment confirms the assertion made by Hodgetts and Luthans (2003) as discussed in Paragraph 5.5.3, that the support and information provided by the company in the areas of accommodation, education and travel could potentially reduce the uncertainty associated with these significant issues and thereby facilitate the expatriate's adjustment to the foreign environment.



Sense of Coherence before assignment showed a significant negative correlation ($r = -0.321$) with Tension before assignment. According to Kossuth (1998), Tension refers to the extent to which the expatriate worries about aspects of his work environment that impose on his time, family, situation or personal grievances. The extent to which these issues are not satisfactory resolved will reflect in the Tension experienced by the person.

In Paragraphs 7.5.2 and 7.5.3 in Chapter 7 a detailed explanation is provided on the role sense of coherence plays in the expatriate's responses towards perceived tension and stress in his external environment. As was discussed in Paragraph 7.5.2, Antonovsky (1991) views sense of coherence as being central to the individual's ability to cope effectively with stressful situations. The sense of coherence mobilises existing generalised resistance resources. The successful utilisation of these resources leads to a reduction of tension. It therefore directly influences the physiological and psychological systems involved in the processing of stress. Consequently, the higher the sense of coherence, the lower the intensity of tension experienced by the expatriate.

No further significant correlations could be identified between Sense of Coherence and any of the other Climate variables before the experimental group's departure on assignment.

10.4.2. Discussion of Hypothesis 3b: Organisational climate prior to assignment is correlated with Hardiness prior to assignment

It was hypothesised that organisational climate prior to assignment is correlated with Hardiness prior to assignment. When the correlations between these two variables were tested, no significant correlations could be identified between any of the Climate before departure variables, and Hardiness before departure on assignment.



10.4.3. Discussion of Hypothesis 3c: Organisational climate during assignment is correlated with Sense of Coherence during assignment

The hypothesis was set that organisational climate during assignment is correlated with Sense of Coherence during assignment. To test this hypothesis, correlations between the Climate variables and the Sense of Coherence mean score of the experimental group during assignment were identified.

Sense of Coherence during assignment showed significant correlations with all the Climate variables during assignment.

Sense of Coherence during assignment correlated significantly and positively ($r = 0.270$) with Role clarity during assignment. Kossuth (1998: 42) defines role clarity as the extent to which employees understand what is expected of them in their work. As was discussed in Paragraph 5.5.2.1 in Chapter 5, Role clarity has been identified by numerous researchers (Harvey & Novicevic, 2001; Black et al, 1999; Morley et al, 1997; Suutari & Brewster, 1997) as the job factor that has the strongest impact on the work adjustment of the expatriate. The clearer the role expectations, the better the expatriate is able to predict how best to behave, which in turn reduces the uncertainty associated with the work situation. Consequently, the expatriate's sense of coherence will also be influenced positively.

Sense of Coherence during assignment showed a significant positive correlation of 0.254 with Communication. Communication is defined by Kossuth (1998) as the extent to which the individual is able to obtain the information necessary to do his job properly, as well as the extent to which both upward and downward communication exists in the workplace. Paragraph 5.5.3 in Chapter 5 provides a detailed discussion on the impact of communication on the adjustment of the expatriate in the foreign environment while on assignment. A few communication-related areas highlighted in Paragraph 5.5.3 would be the lack of communication that can exist as a result of the distance between the parent company and the subsidiary operation where the expatriate is situated (Kubes & Loh, 2006), the expatriate's ability and willingness to communicate in the local language of the host society (Suutari & Brewster, 1997), and the extent to which the expatriate is allowed into the "inner communication channels" by the local nationals at the foreign subsidiary (Cascio & Aguinis, 2005).



Communication is also specifically highlighted by Kubes & Loh (2006) as a major organisational factor that influences the adjustment of the expatriate in the foreign environment. Taking into consideration the above mentioned observations, the inference can be made that Communication can potentially have a direct impact on the sense of coherence experienced by the expatriate while on assignment.

A significant positive correlation of 0.387 was found between Satisfaction and Sense of Coherence during assignment. Kossuth (1998) describes Satisfaction as the extent to which the individual enjoys his work in that he is able to exercise his skills in the performance of his function.

A detailed discussion on expatriate satisfaction as both an outcome and as an influence on expatriate performance is provided in Chapter 5 of this research. A point that needs to be emphasised would be the assertion by Forehand and Gilmer (as cited in Kossuth, 1998) that satisfaction is an outcome variable that is significantly influenced by personal variables such as attitudes and motives that the person brings with him into the work situation.

Similarly, in his description of the sense of coherence concept, Antonovsky (1991) asserts that the individual's state of health and ability to cope with stress is determined to a significant extent by his general attitude toward the world and his own life.

The emphasis placed on the individual's general attitude towards his job and life in general by both Kossuth (1998) and Antonovsky (1991) provides a confirmation of the positive relationship existing between Satisfaction and sense of coherence while on assignment.

A significant negative correlation ($r = -0.489$) was found between Sense of Coherence during assignment and Tension during assignment. From an expatriate point of view, Tension is viewed from a broader perspective and incorporates the extent to which the individual experiences his personal, work, and social environment as being stressful. A detailed discussion on the pressures being placed on the expatriate during the various phases of the international career cycle that lead to him experiencing significant levels of tension can be seen in Paragraph 5.3 in Chapter 5, and Paragraph 7.2 in Chapter 7.

As was discussed in Paragraph 7.5.3 in Chapter 7, Anderzen and Arnetz (1999) found that expatriates with a high level of sense of meaning have a stronger ability to minimise the impact of the external environment on specific stress-related chemical reactions taking place in the human body during periods of extensive travel and pressure. These research findings provide an explanation for the negative correlation that emerged between Sense of Coherence and Tension during assignment.

Sense of Coherence during assignment showed a fairly strong significant positive correlation ($r = 0.434$) with Propensity to Stay during assignment. Propensity to stay is defined by Kossuth (1998) as the extent to which the individual is likely to want to stay with the organisation, as opposed to searching for alternative employment. Within the broader expatriate perspective, Van der Bank and Rothman (2002) refer to propensity to leave (the opposite of propensity to stay) as the individual's "desire to terminate his assignment" (as was discussed in Paragraph 8.6.4.1 in Chapter 8). They describe the individual's desire to terminate the assignment as the most basic behavioural criterion for assessing the outcome of an expatriate assignment. They also consider sense of coherence as a buffer against the expatriate's desire to prematurely terminate the assignment.

A significant positive correlation of 0.397 was found between Sense of Coherence during assignment and Leadership during assignment. According to Kossuth (1998: 47), Leadership refers to the extent to which individuals view the management team in the company as being competent, credible, and trustworthy. Kossuth identifies leadership as a critical factor that has an influence on the psychological atmosphere or climate of the organisation, as well as the sense of purpose experienced by the individual during the conduct of his work.

Taking into account the above mentioned observations, it makes sense that Sense of Coherence will show a significant positive correlation with Leadership during assignment. A detailed discussion on the impact of leadership on expatriates and their performance while on international assignment can be found in Paragraph 5.5.3 of Chapter 5.



10.4.4. Discussion of Hypothesis 3d: Organisational climate during assignment is correlated with Hardiness during assignment

A further hypothesis set during this study is that Organisational climate during assignment is correlated with Hardiness during assignment. In order to test this hypothesis, correlations between the Climate variables and the Hardiness mean score of the experimental group during assignment were identified.

Hardiness during assignment correlated significantly with most of the Climate variables during assignment. The only exceptions were Role Clarity ($r = 0.067$) and Communication ($r = 0.208$) during assignment, where limited correlations could be detected. Hardiness during assignment also showed significant positive correlations with Communication ($r = 0.304$) and Satisfaction ($r = 0.290$) before assignment.

Yavas and Bodur (1999) state that expatriate satisfaction refers to three specific aspects: satisfaction with the work environment, satisfaction with the expatriation process, as well as satisfaction with the personal aspects of expatriation. In their research, Yavas and Bodur (1999) found a direct relationship between the satisfaction experienced by expatriate managers, and their commitment towards their assignments and companies of employment. These results are confirmed by similar research conducted by Stahl et al (2002), who found that the levels of satisfaction experienced by the expatriate while on international assignment also provide some indication of the expatriate's levels of commitment towards the company on their repatriation after completing their assignments.

10.4.5. Summary

The postulate is set that there is a significant correlation between organisational climate prior to and during the international assignment and the levels of emotional health experienced by the expatriate. The results obtained from the statistical analyses in testing this hypothesis indicate that a considerable number of the Climate factors show significant correlations with Sense of Coherence and Hardiness as indicators of expatriate emotional health.



Also of relevance is the relatively small number of correlations found between the Climate variables before assignment, compared to the very strong and significant correlations obtained between the Climate variables and Sense of Coherence and Hardiness during assignment. A possible reason for the small number of significant correlations found between the Climate variables and Sense of Coherence and Hardiness is possibly provided in Paragraph 9.4, where it was found that the subjects tended to rate themselves too positively on all the variables included in the study. As was discussed in Paragraph 9.4 of this chapter, Kossuth (1998) asserts that this “leniency error” could have an impact on the outcomes of statistical analyses where such data is utilised.

The strong correlations found amongst Sense of Coherence and Hardiness during assignment and almost all the Climate variables during assignment confirm the assertions made by both Antonovsky and Kobasa that a direct interaction takes place between the person and his external environment. Antonovsky (1993) indicates that a radical change in one’s structural external situation (for example expatriation) can lead to a significant modification in one’s sense of coherence (please find a more detailed discussion in this regard in Paragraph 7.5.3 in Chapter 7). Kobasa (as cited in Pott, 1998: 52) also views hardiness as a dynamic personal characteristic that can change as the individual interacts with his external environment (see Paragraph 7.6 in Chapter 7 for a more detailed discussion in this regard).

10.5. Discussion of Objective 4: Interaction between expatriate personality and perception of the organisational climate while on international assignment

Objective 4 established in this study was to establish the nature of the relationship that exists between expatriate personality and the individual’s perception of the organisational climate while on international assignment. The corresponding postulate states that a direct correlation exists between the individual’s personality traits and the individual perception of the organisational climate prior to and during assignment. In testing this postulate, the following hypotheses were tested:



10.5.1. Discussion of Hypothesis 4a: Correlations between individual personality traits and Organisational Climate variables before assignment

The hypothesis is set that individual personality traits are correlated with Organisational Climate variables before assignment. This hypothesis was firstly tested by investigating the correlations between the five global personality factors and the Climate variables of the experimental group before their departure on assignment. Subsequently, the correlations between the primary 16PF personality factors and the Climate variables of the experimental group before their departure on assignment were also investigated.

No significant correlations could be identified between the five global personality factors and any of the Climate variables before departure on assignment.

Self-sufficiency (Factor Q2) showed a significant negative correlation with Communication before assignment ($r = -0.238$). Lord (2000: 62) describes Self-sufficiency as the individual's preference to be around people and to be involved in group activities. Of relevance in this regard would be the assertion made by Cattell et al (1988: 105) that the person who scores high on self-sufficiency tends to be significantly more dissatisfied with group integration and interaction, and shows a stronger preference to make decisions and solve problems on his own without requiring the involvement of others. Kossuth (1998) defines Communication as the extent to which the individual is able to obtain the information necessary to do his job properly, as well as the extent to which both upward and downward communication exists in the workplace.

Taking into account the strong preference of a strongly self-sufficient expatriate for self-reliance and independence during the conduct of his work, it can be expected that this person would tend to make use of his own resources in order to obtain the information necessary to do his job. As a result, the expatriate would not really be inclined to utilise the available communication in the company. This explains the significant negative correlation between Self-sufficiency and Communication.



Control (Factor Q3) indicated a significant negative correlation with both Role clarity ($r = -0.246$) and Leadership ($r = -0.218$) before assignment. According to the Institute for Personality and Ability Testing (2007: 7), individuals scoring higher on Control tend to be more organised and systematic, with a strong preference towards structure. However, they also caution that an extremely high level of Control may lead to the individual becoming rigid and inflexible. Furthermore, high scorers on Control tend to lose efficiency as the amount of structure in their external environment decreases. The mean score of the experimental group on Factor Q3 (Control) was 7.23, which indicates that the average individual included in the experimental group would show a relatively strong need for structure and predictability in his external environment.

Role clarity is defined by Kossuth (1998) as the extent to which employees understand what is expected of them in their work. In order to obtain a logical reason for the negative correlation existing between Control and Role clarity, it is important to note the comments made in Paragraph 8.4.2.3 on the demographics of the subjects included in the experimental group. The vast majority of participants included in the experimental group were white males (75 percent) who may have been unemployed and who possibly could have found themselves in a position where they were not always able to find alternative employment due to factors such as Affirmative Action limiting the career opportunities available to them. Due to the fact that a significant number of these individuals were in a period of transition from an employment perspective, these people would not have any clear perspective of their roles in any particular organisation.

The inference can therefore be made that the highly controlled expatriate (scoring high on Factor Q3) may experience lower levels of Role clarity during periods of transition from a position in South Africa to a new position as an expatriate in a foreign country. This may explain the significant negative correlation existing between Factor Q3 (Control) and Role clarity.



10.5.2. Discussion of Hypothesis 4b: Correlations between individual personality traits and Organisational Climate variables during assignment

The hypothesis is set that individual personality traits are correlated with Organisational Climate factors during assignment. This hypothesis was tested by firstly determining the correlations between the five global personality factors and the Climate variables of the experimental group after six months on assignment. Following this investigation, the correlations emerging between the primary 16PF personality factors and the Climate variables of the experimental group after spending six months on assignment were also evaluated.

10.5.2.1. Global personality factors

A significant positive correlation was found between Global Five Self-control and Role clarity during assignment ($r = 0.271$).

Self-control is defined by Cattell et al (2007; 1988) as the extent to which the person values competence, order, and self-discipline, as well as the extent to which he effectively and efficiently plans, organises, and carries out tasks. Typical dimensions included in the Self-control dimension would be being dependable, reliable, careful, thorough, etcetera.

According to Kossuth (1998), Role clarity can be defined as the extent to which the employee understands what is expected of him in the specific function. A detailed discussion was conducted in Paragraph 5.5.2 on the importance of the individual being able to create structure and organisation for him or herself in a highly ambiguous and unpredictable work and social environment.

Taking into account the above mentioned definitions, the inference can be made that the more able and willing the person is to effectively and efficiently plan, organise, and carry out his responsibilities as an expatriate (high Self-control), the more he will be able and willing to clarify and understand his role during the international assignment (high Role clarity). Conversely, it is also expected that the higher the levels of role clarity experienced by the expatriate, the more the individual will be able to effectively and efficiently plan, organise, and carry out tasks (high levels of Self-control).



Taking into account the above mentioned observations, it makes sense that the global personal factor Self-control would be positively correlated with the amount of role clarity experienced by the expatriate during the conduct of his work.

The above mentioned findings are in line with the research conducted by Barrick and Mount (as cited in Harvey & Novicevic, 2001), who found that the Self-control global personality factor was the best single predictor of individual expatriate performance. Van der Bank and Rothman (2002) also come to the conclusion that an elevated level of self-control is positively related to expatriate work performance, as well as the successful completion of the expatriate assignment.

10.5.2.2. Primary personality factors

Outgoing (Factor A) showed significant positive correlations with Communication ($r = 0.378$), Role clarity ($r = 0.290$), as well as Leadership ($r = 0.227$) during assignment.

According to Cattell et al (1988: 81), individuals scoring high on Factor A (Outgoing) tend to be easygoing, have a strong need for interpersonal contact with others, and prefer operating in a team context.

Kossuth (1998) describes Communication as the extent to which the individual is able to obtain the information necessary to do his job, as well as the extent to which both upward and downward communication exists in the workplace. It makes sense that Factor A (Outgoing) and Communication during assignment would be positively related to each other. The stronger the expatriate's preference to interact with others in his external environment, the more informed he can expect to be on developments having an impact on his work performance, and the more willing the person will be to actively communicate with his superiors on areas of concern. On the other hand, it also makes sense that the more the expatriate feels that the communication channels in the Company are open and cooperative, the more willing and able he will be to interact spontaneously with others in the work and social environment.



Role clarity is defined by Kossuth (1998) as the extent to which employees understand what is expected of them in their work. A detailed discussion was conducted in Paragraph 5.5.1 in Chapter 5 on the impact the individual's ability to meet new people and interact with them, has on his ability to integrate effectively into the expatriate work and living environment. Within the framework of these discussions, the inference can therefore be made that the more willing and able the expatriate is to interact with his colleagues and the local nationals in the foreign country, the stronger the possibility that the person will have a clear understanding of what is expected of him in his work. Conversely, it is also possible that the more the person feels comfortable that his role in the company has been clearly defined, the more comfortable he will feel to openly interact with others in his external environment.

Leadership is defined by Kossuth (1998) as the extent to which individuals view the management team in the organisation as being competent, credible, and trustworthy. In line with the previous discussions, it makes sense to expect a positive correlation between Factor A (Outgoing) and Leadership during assignment. The more able and willing the expatriate is to maintain positive relations with senior management in the company, the more the probability that he will have a positive perception towards their competence and credibility. In addition, he will also have a better understanding of the difficulties and demands the management team is required to deal with in establishing a new business venture in a foreign country.

The above mentioned results are consistent with research conducted by a number of researchers (Guthrie et al, 2003; Van der Bank & Rothmann, 2002; Caligiuri, 2000; Black et al, 1999), who found that an expatriate's ability and willingness to develop significant relationships with others has a positive impact on his adjustment to the external environment, as well as his ability to gain access to valuable information relating to the work and the social environment (see Paragraph 7.7.3.1 in Chapter 7 for a more detailed discussion on the research conducted by the above mentioned researchers).



Assertiveness (Factor E) showed a significant positive correlation of 0.270 with Satisfaction during assignment. Cattell et al (1988: 86) describes Assertiveness as a measure of the expatriate's dominance versus submissiveness in an interpersonal context. A person scoring high on Assertiveness enjoys being in control of situations involving other people. An interesting comment made by Cattell et al (1988: 87) in this regard is that teams that indicate a high overall rating on Factor E (Assertiveness) tend to show more effective role interaction and decision making, and also feel more open towards participating in activities.

Kossuth (1998) defines Satisfaction as the extent to which the individual enjoys his life and work, in the sense that he is able to exercise his skills in the performance of his function.

Taking into account the above average Assertiveness mean score obtained by the experimental group (6.71), it is plausible that the higher the expatriate's ability to exert influence on others towards his point of view, the higher the possibility that the person will experience feelings of satisfaction and control over his external environment. Alternatively, the possibility also exists that the more satisfied the expatriate is with his life and work, the more comfortable the person will feel to assert his authority over others during his interactions with them.

Adventurous (Factor H) showed a significant negative correlation with Role clarity during assignment ($r = -0.279$), and Satisfaction during assignment ($r = -0.233$). The reasons for the negative correlation between Adventurous and these variables are unclear, as the expectation would be that the higher the levels of adventurousism displayed by the individual, the lower the amount of role clarification required by the individual during the conduct of his work as an expatriate, and the higher the levels of satisfaction experienced by the expatriate. Cattell et al (1988: 92) specifically indicate that a high score on Factor H (Adventurous) is a very important criterion in identifying suitability for occupations that demand "the ability to face wear-and-tear in dealing with people and gruelling emotional situations" (such as being sent on an international assignment).



Imaginative (Factor M) correlated negatively with Role clarity during assignment ($r = -0.314$). According to Cattell et al (1988: 99), Factor M refers to a literal detail orientation versus an imaginative big picture orientation. A person scoring low on Imaginative tends to be strongly in touch with practical realities, and prefers to focus on clarity of the here-and-now. In turn, the high scoring individual prefers to focus on the inner self for abstract and creative ideas, and shows a disregard and dislike towards practical rules and procedures. Taking into account these observations, the inference can be made that the stronger the expatriate's disregard towards practical rules and procedures (a high score on Factor M), the higher the possibility that he will not have a clear understanding of what is expected of them in their work (low levels of Role clarity). The person will also probably not have a very strong need for role clarity in his position.

Shrewd (Factor N) showed a significant positive correlation of 0.426 with Role clarity during assignment. One of the characteristics associated by Cattell et al (1988: 99) with Factor N (Shrewd) is the ability and preference to deal with situations in an exact and calculated way. Other characteristics associated with high levels of Shrewdness would be those of being emotionally detached and disciplined. As was discussed in Paragraph 5.5.1, the expatriate's ability to accurately and objectively consider and evaluate the host environment and the people living in the country (high levels of Shrewdness) directly influences his ability to make the appropriate adjustments in order to integrate into the local culture and work environment in the host-country (high Role clarity). Taking into account these observations, positive correlation between Factor N (Shrewdness) and Role clarity can be expected.

10.5.3. Summary

Objective 4 is to establish the nature of the interaction that exists between expatriate personality and the individual's perception of the organisational climate while on assignment. The corresponding postulate states that a direct correlation exists between the expatriate's personality traits and his perception of the organisational climate prior to and during assignment.

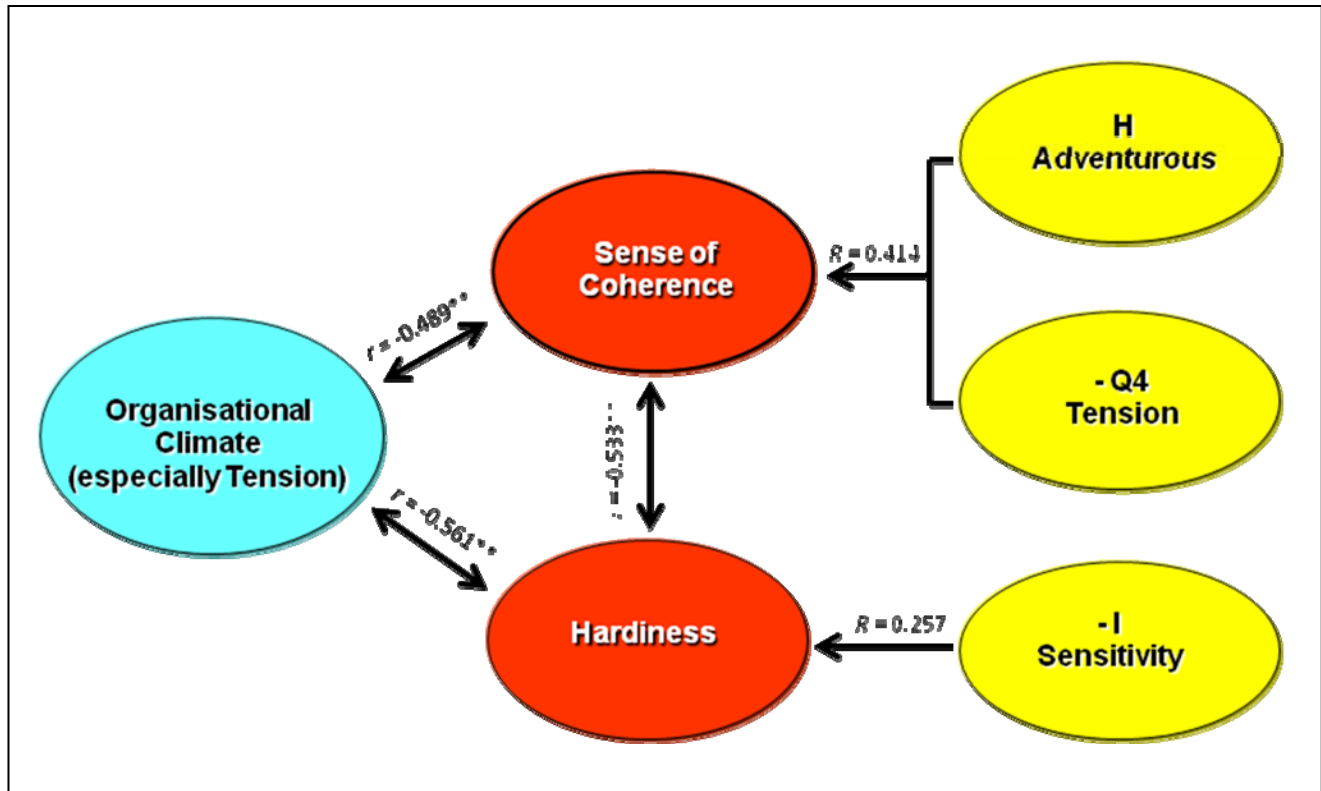


In testing the above mentioned postulate, significant correlations could be identified between a considerable number of the personality traits and Organisational Climate variables prior to departure and after spending six months on assignment. Based on these findings, the inference can be made that a dynamic interaction takes place between the individual's personality and his perception of the organisational climate during the phases of the expatriation process. Taking into account the significant correlations that were also obtained between these factors and the expatriate's emotional well-being while on assignment as assessed on the Sense of Coherence and Hardiness Scales, the possibility exists that certain causal relationships may potentially exist among the various variables included.

10.6. Discussion of Objective 5: To investigate the main personality and organisational climate predictors of the expatriate's levels of emotional health while on an international assignment in a foreign country.

In order to investigate these relationships, a regression analysis was conducted where all climate and personality variables were used respectively as predictors of emotional health. Based on the outcomes of the regression analysis, a graphical representation of a potential expatriate adjustment model is presented in Figure 9.12. It needs to be noted that a proper structural equation model could not be established due to sample size considerations.

Figure 10.1.: Potential expatriate emotional adjustment model extrapolated from multiple regression analysis



Although Sense of Coherence during assignment was correlated with all the Climate variables during assignment (as was shown in the discussion of Hypothesis 3c in Paragraph 9.6.7.2), the multiple regression indicated that Tension during assignment was the only significant predictor of Sense of Coherence during assignment.

Hardiness was correlated with most of the Climate variables during assignment, with the exceptions being Role clarity and Communication. The multiple regression conducted indicated again that Tension during assignment was the only significant predictor of Hardiness during assignment. Tension was therefore found a significant predictor of both Sense of Coherence and Hardiness.

A significant and strong correlation of 0.533 was found between Sense of Coherence and Hardiness during assignment. This strong correlation indicates that the two variables may be evaluating similar underlying constructs. As was discussed in Paragraph 7.6.1 in Chapter 7, Antonovsky (as cited in Pott, 1998) argues that the two constructs are assessing the same underlying factor. The correlation of 0.533 found in the present study does not warrant the conclusion that these two variables are measuring the same construct, rather that they are probably both indicators of a larger construct, namely emotional health.

The correlations discussed in Paragraph 9.6.2 indicated that Sense of Coherence was significantly correlated with Factors F (Enthusiastic), H (Adventurous), I (Sensitive), and Q4 (Tense) of the 16PF. The multiple regression analysis conducted where these four personality factors were entered as predictors of Sense of Coherence during assignment found that only Factor H (Adventurous), and Factor Q4 (Tension) were significant predictors of Sense of Coherence.

The correlations identified in Paragraph 9.6.2 in Chapter 9 indicated that Hardiness was significantly correlated only with Factor I (Sensitive) of the 16PF. The results from the linear regression analysis indicated that low Sensitivity was a predictor of Hardiness during assignment. However, the amount of variance explained was small.

It would appear that there are indications that the postulated model could be valuable. However further investigations using structural equation modelling on larger samples will have to be conducted in order to verify the model.

10.7. Summary

All the postulates and hypotheses set initially during this research were confirmed. A conclusive discussion on the results obtained from this study is provided in Chapter 11.



Chapter 11

Conclusion and Recommendations

11.1. Introduction

The results of the research were presented and discussed comprehensively in Chapter 9. In Chapter 10 the main conclusions will be presented as they relate to the objectives set in Chapter 1. These conclusions will be based on the results obtained in Chapter 9. Recommendations will also be made for further research and application of the results.

11.2 Conclusions

Conclusions are herewith presented for each objective:

11.2.1. Conclusions regarding Research objective 1: To establish the impact that the expatriation process has on the expatriate's emotional health

The main conclusion is that the emotional health of the expatriate, as assessed on the Sense of Coherence (Antonovsky, 1993) and Hardiness (Kobasa, 1982) Scales, is directly and significantly influenced during the three phases of the international assignment.

11.2.1.1. Hypothesis 1a

Hypothesis 1a stated that the individual's sense of meaning decreases from prior to assignment to six months into the assignment. Hypothesis 1a was confirmed during this study. The conclusions regarding Hypothesis 1a are the following:



- The pre-departure Sense of Coherence mean score of the experimental group was found to be significantly higher than their Sense of Coherence mean score obtained six months after arrival in the foreign country.
- The experimental group scored significantly higher than the control group on Sense of Coherence before departure on assignment.
- After spending six months on international assignment in a foreign country, the experimental group reported a significantly lower Sense of Coherence mean score compared to the control group.
- No significant differences could be detected in the Sense of Coherence mean scores of the subjects included in the control group before departure and after six months on assignment.

11.2.1.2. Hypothesis 1b

Hypothesis 1b stated that the individual's sense of meaning decreases from six months into the assignment to after completion of assignment. This hypothesis was confirmed. The conclusions reached regarding Hypothesis 1b are the following:

- The Sense of Coherence mean score of the experimental group decreased significantly from six months on assignment to after completion of assignment.
- The Sense of Coherence mean score of the experimental group was significantly lower than the mean score of the control group when measured after completion of the international assignments.
- No significant differences in the Sense of Coherence mean scores of the control group were observed when measured after six months on assignment and after the experimental group's return from the international assignment.

11.2.1.3. Hypothesis 1c

The following conclusions are reached relating to Hypothesis 1c, which states that the individual's hardiness decreases from prior to assignment to six months into the assignment:

- The pre-departure Hardiness mean score of the experimental group was found to be significantly higher than their mean score obtained six months after arrival in the foreign country.



- The Hardiness mean score of the experimental group before departure on assignment was significantly higher than the mean score of the control group.
- No significant differences could be detected when the Hardiness mean scores of the experimental and control groups were compared with each other after six months on assignment. The experimental group scored slightly higher than the control group. However, this difference was not sufficiently significant.
- No significant differences were observed in the control group's Hardiness mean score before departure on assignment when compared with their mean score equivalent to after six months on assignment.

11.2.1.4. Hypothesis 1d

Hypothesis 1d states that the individual's hardiness decreases from six months into the assignment to after completion of assignment. The conclusions reached in achieving this hypothesis were the following:

- No significant difference was observable in the mean scores of the experimental and control groups on Hardiness after the experimental group's return from assignment. The experimental group scored slightly lower than the control group. However, this difference was not sufficiently significant.
- The Hardiness mean scores of the experimental group decreased significantly from six months on assignment to after returning from assignment.
- No significant difference could be detected in the Hardiness mean scores of the experimental and control groups after their return from their international assignments.
- No significant differences could be detected in the Hardiness mean scores of the control group when their responses equivalent to six months after arrival on assignment, were compared with their results after completion of their assignments.

A detailed discussion on the results obtained in achieving Research objective 1 can be found in Paragraph 9.5.4 in Chapter 9.



11.2.2. Conclusions relating to Research objective 2: To establish the interaction that exists between the expatriate personality and the individual's emotional adjustment during the various phases of the expatriation process

The key conclusion reached in investigating Objective 2 was that a direct correlation exists between the individual's personality traits and his or her emotional adjustment while on an international assignment as assessed on the Sense of Coherence and Hardiness Scales. However, the relatively small number of correlations observable among the global five personality factors and the Sense of Coherence and Hardiness variables also highlight the danger of only utilising the global five factors of personality, without taking into consideration the more specific personality traits as assessed more directly on the primary 16PF factors.

For a detailed discussion on the statistical results obtained in proving Research objective 2, refer to Paragraphs 9.6.3 and 9.6.7.1 in Chapter 9.

11.2.2.1. Hypothesis 2a

The conclusions relating to Hypothesis 2a, which states that individual personality traits are correlated with sense of coherence during the assignment, were the following:

- No significant correlations could be identified between any of the five global personality factors and Sense of Coherence before departure, after six months on assignment, or on return after completion of assignment.
- Sense of Coherence before departure showed a significant positive correlation with primary 16PF Factor C (Stable), and a significant negative correlation with Factor Q4 (Tension).
- Sense of Coherence during assignment showed a significant positive correlation with primary 16PF Factor F (Enthusiasm). Sense of Coherence during assignment also showed a significant negative correlation with primary 16PF Factor H (Adventurous), Factor I (Sensitivity), and Factor Q4 (Tension).



- A significant positive correlation was found between Sense of Coherence after completion of assignment and primary 16PF Factor Q1 (Liberal). Sense of Coherence also correlated significantly and negatively with Factor Q4 (Tension).

11.2.2.2. Hypothesis 2b

Hypothesis 2b stated that significant correlations exist between individual personality traits (both global and primary personality variables) and hardiness during the various phases of the international assignment. The following conclusions were reached relating to Hypothesis 2b:

- Hardiness before departure showed significant negative correlation with global personality factor Anxiety proneness.
- Hardiness during assignment showed significant negative correlations with global personality factors Anxiety proneness and Openness .
- Hardiness before assignment showed a significant positive correlation with primary 16PF personality Factor C (Stable), and a significant negative correlation with Factor Q4 (Tension).
- Hardiness during assignment showed a significant negative correlation of -0.257 with primary 16PF Factor I (Sensitivity).
- A significant positive correlation was found between Hardiness after completion of assignment and primary 16PF Factor Q1 (Liberal). A significant negative correlation was also observed between Hardiness after completion of assignment and Factor M (Imaginative).



11.2.3. Conclusions reached relating to Research objective 3: To establish the impact of organisational climate factors on the emotional adjustment of the individual prior to departure on the international assignment, and after six months on assignment

The following conclusions were reached relating to Research objective 3:

- Significant correlations were found between most of the Climate variables during assignment and Sense of Coherence and Hardiness during assignment.
- Limited significant correlations could be identified when the Climate variables before assignment were correlated with Sense of Coherence and Hardiness before assignment. As was discussed in Paragraph 9.4 in Chapter 9, these low correlations may have been the result of the negative skewness observed in self-assessment results of the subjects who may have tended to “over-present” themselves in their attempts to secure the available expatriate positions available in the companies.

11.2.3.1. Hypothesis 3a

The conclusions reached in testing Hypothesis 3a, which stated that organisational climate prior to assignment is correlated with sense of coherence before departure on assignment, were the following:

- Sense of Coherence before assignment showed a significant positive correlation with Communication before assignment, and a significant negative correlation with Tension before assignment.

11.2.3.2. Hypothesis 3b

Hypothesis 3b indicated that Organisational climate before assignment is correlated with hardiness before departure on assignment. The following conclusions were reached in testing this hypothesis:

- No significant correlations could be observed between the Climate variables before departure and Hardiness before departure on assignment. Hypothesis 3b could therefore not be confirmed.

11.2.3.3. Hypothesis 3c

Hypothesis 3c specified that Organisational climate during assignment is correlated with sense of coherence during assignment. In testing this hypothesis, the following conclusions were reached:

- Sense of Coherence during assignment showed significant correlations with all the Climate variables during assignment.

11.2.3.4. Hypothesis 3d

In testing Hypothesis 3d, which stated that organisational climate during assignment is correlated with Hardiness during assignment, the following conclusions were achieved:

- Hardiness during assignment correlated significantly with most of the Climate variables during assignment. Hardiness during assignment showed a significant positive correlation with Satisfaction, Propensity to Stay, and Leadership during assignment, and a significant negative correlation with Tension during assignment.

A detailed discussion on the statistical analyses and results obtained in proving Objective 3 can be found in Paragraphs 9.6.3 and 9.6.7.2 in Chapter 9.

11.2.4. Conclusions reached relating to Objective 4: To establish the nature of the interaction between the expatriate personality and the person's perception of the organisational climate while on international assignment

The main conclusion reached in investigating this objective was that a considerable number of relationships exist between primary 16PF personality factors and Climate variables during assignment.

11.2.4.1. Hypothesis 4a

The conclusions reached in testing Hypothesis 4a, which stated that individual personality traits are correlated with organisational climate factors before assignment, were the following:

- No significant correlations could be identified between the five global personality factors and any of the Climate variables before departure on assignment.
- Two primary 16PF factors (Self-sufficiency and Control) showed significant correlations with Climate variables before assignment.

11.2.4.2. Hypothesis 4b

Hypothesis 4b stated that individual personality traits are correlated with organisational climate factors during assignment. The following conclusions were reached in testing this hypothesis:

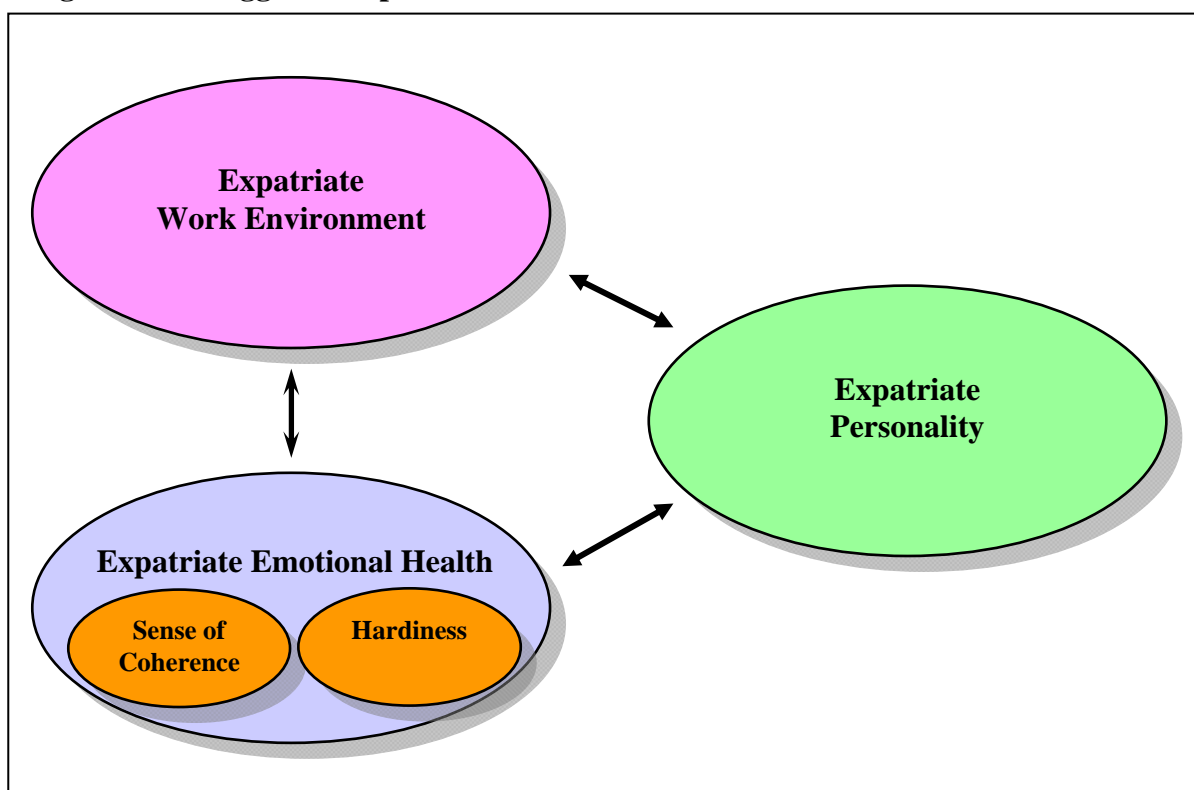
- A significant positive correlation was found between global personality factor Self-control and Role clarity during assignment.
- The following significant correlations were observed between the primary 16PF factors and the Climate variables after six months on assignment:
 - Factor A (Outgoing) showed significant positive correlations with Communication, Role clarity, and Leadership during assignment.
 - Factor E (Assertiveness) showed a significant positive correlation with Satisfaction during assignment.
 - Factor H (Adventurous) showed a significant negative correlation with Role clarity and Satisfaction during assignment.
 - Factor M (Imaginative) correlated significantly and negatively with Role clarity during assignment.
 - Factor N (Shrewd) showed a significant positive correlation with Role clarity during assignment.

The results for Research objective 4 are comprehensively discussed in Paragraphs 9.6.3 and 9.6.7.2.

11.2.5. Conclusions relating to Objective 5: To investigate the main personality and organizational climate predictors of the expatriate's levels of emotional health while on an international assignment in a foreign country.

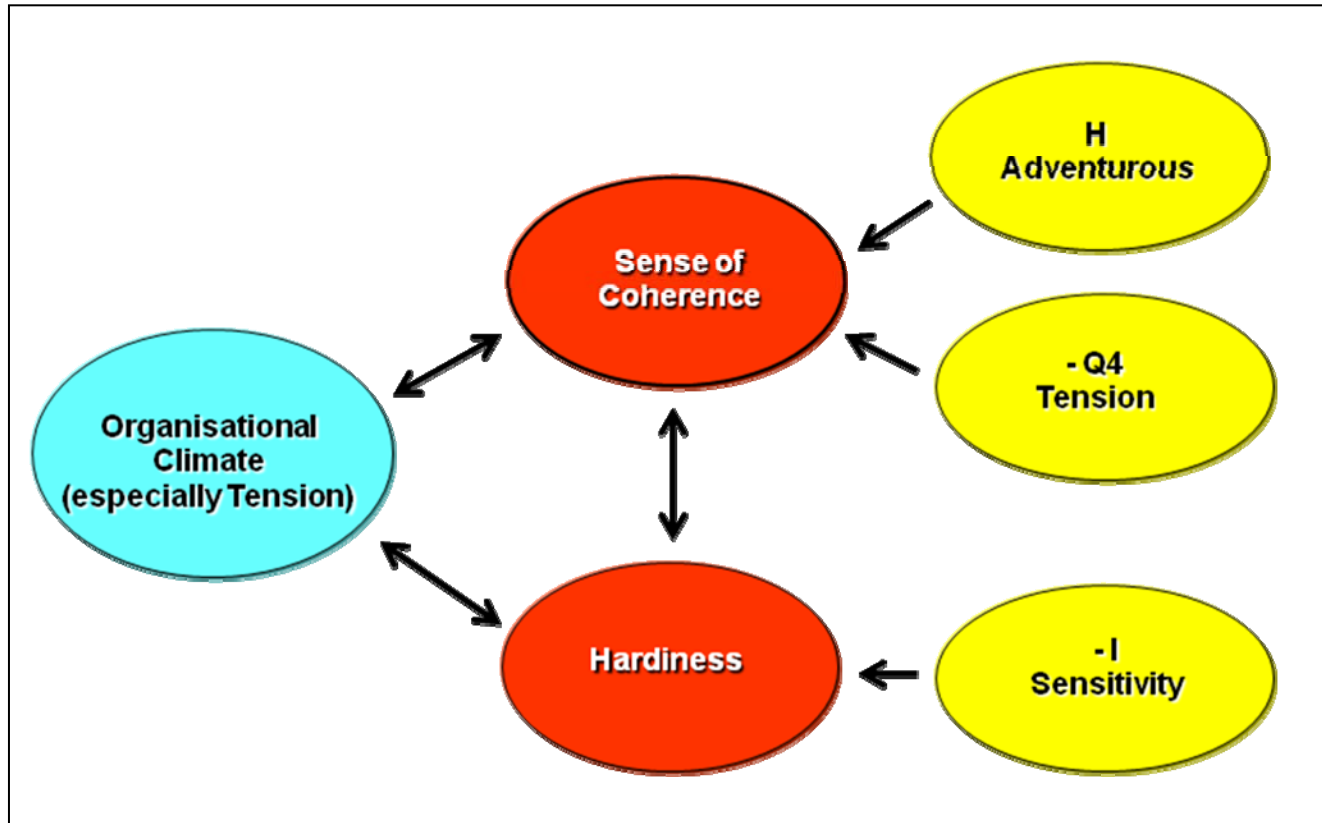
A graphical layout of the expatriate emotional health model postulated in Chapter 1 is presented in Figure 10.1:

Figure 11.1: Suggested expatriate emotional health model



The statistical analyses conducted during this research provide preliminary support for the above mentioned model. Figure 10.2 presents a potential expatriate emotional adjustment model that can be extrapolated from the analyses conducted. It needs to be noted that a proper structural equation model could not be established due to sample size considerations.

Figure 11.2.: Potential expatriate emotional adjustment model extrapolated from multiple regression analysis



Herewith, the main conclusions reached on the extrapolated expatriate adjustment model:

11.2.5.1. Climate as a predictor of Sense of Coherence and Hardiness

- Tension during assignment was identified as a significant Climate predictor of Sense of Coherence and Hardiness during assignment.
- A significant and strong correlation was observed between Sense of Coherence and Hardiness during assignment. This strong correlation indicates that the two variables may both be indicators of a larger construct, namely emotional health.



11.2.5.2. Personality as a predictor of Sense of Coherence and Hardiness

- Low primary 16PF Factor H (Adventurous) and high Factor Q4 (Tension) were found significant predictors of Sense of Coherence during assignment.
- Low primary 16PF Factor I (Sensitivity) was indicated as a predictor of Hardiness during assignment.

The multiple regression analysis and detailed results for Research objective 5 are comprehensively discussed in Paragraph 9.7 in Chapter 9.

11.3. Recommendations for further research and application

Recommendations on how the research on expatriate emotional health can be improved and extended are provided below:

- It is recommended that the research be repeated making use of larger samples of at least 100 subjects included in both the experimental and the control groups. This will allow for confirmatory factor analyses to be conducted in order to test the validity and robustness of the empirical expatriate emotional adjustment model established during this study.
- A measurement of actual expatriate work performance while on international assignment should be included as an independent variable against which the emotional health of the individuals can be compared.
- It is furthermore recommended that a more updated version of the Sixteen Personality Factor Questionnaire such as the 16PF-5 be utilised in future research as a measurement of expatriate personality.



- In order to obtain a more accurate indication of the reliability and construct validity of the 16PF, the raw scores obtained from the subjects included in the sample should be utilised, as opposed to only using the standardised sten scores as was the case in this study.
- To cover the full spectrum of the expatriate adjustment process as was discussed in Chapter 5 in this study, appropriate instruments should be included that measure the impact of the cultural and personal environments within which the expatriate is required to function in adjusting to the conditions in the foreign country.
- It is recommended that further research be conducted on the appropriateness of the potential expatriate model as described in Paragraph 10.2.5 in order to investigate its validity and reliability.

The following recommendations are made regarding the practical application of the results and conclusions obtained from this research:

- The results obtained from this study can be used as meaningful input that can be utilised by human resource practitioners and line managers responsible for expatriates to effectively select, prepare, and manage their international workforce within the framework of scientifically based processes and principles. It is recommended that the suggested model be researched in more detail in order to establish its value as a predictor of expatriate adjustment and performance.
- The results and conclusions presented in this research can be utilised to prepare and counsel future expatriates from an emotional health perspective on the demands and pressures they can expect to be faced with as they progress through the various phases of their international assignments.
- The results and conclusions can also be utilised within a corporate environment to proactively identify and deal with potential areas of concern that could impact on prospective expatriates' expected ability to cope with the pressures he or she will be faced with prior to their departure on international assignment.



- Expatriates already on international assignment who may be experiencing difficulty coping with the demands placed on them can be identified and provided with the appropriate support by making use of the expatriate emotional adjustment model.
- From an organisational climate perspective, the key work environmental variables influencing expatriate emotional health can be measured and managed according to empirically proven principles and processes.
- Customised repatriation interventions may be presented to meet the emotional health requirements of expatriates returning to the parent company and home country on their completion of their international assignments.

11.4. Summary

In Chapter 11, a conclusive discussion was conducted on the outcomes of the research according to the objectives originally established in Chapter 1. The culmination of the conclusions made in this chapter led to the establishment of an empirically sound expatriate emotional adjustment model. Recommendations were also made with respect to future research that may be conducted, as well as the practical application of the expatriate emotional adjustment model extrapolated in this research.



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APPENDICES



Appendix A:

Item Analysis for Sense of Coherence Scale

Question	Scale Item	Item Mean	Item variance	Item-scale Correlation	Range	% of Subjects Selected	Direction
1	1-1	5.662	1.633	0.49	1 2 3 4 5 6 7	27 41 13 9 8 1 1	-
3	1-2	5.188	1.620	0.38	1 2 3 4 5 6 7	2 2 6 14 31 33 12	+
5	1-3	5.515	1.867	0.55	1 2 3 4 5 6 7	22 44 13 11 6 3 1	-
10	1-4	4.981	1.922	0.56	1 2 3 4 5 6 7	2 3 10 21 23 30 12	+
12	1-5	5.740	1.887	0.59	1 2 3 4 5 6 7	2 4 4 5 13 43 31	+
15	1-6	5.188	1.484	0.59	1 2 3 4 5 6 7	1 3 4 16 29 39 9	+
17	1-7	4.039	3.245	0.45	1 2 3 4 5 6 7	8 14 21 15 16 15 11	+



Appendix A continued: Item Analysis for Sense of Coherence Scale

Question	Scale Item	Item Mean	Item variance	Item-scale Correlation	Range	% of Subjects Selected	Direction
19	1-8	5.416	1.691	0.67	1 2 3 4 5 6 7	1 3 5 15 18 40 19	+
21	1-9	5.464	1.593	0.49	1 2 3 4 5 6 7	1 3 5 9 21 44 17	+
24	1-10	5.516	1.717	0.64	1 2 3 4 5 6 7	2 3 3 10 19 44 19	+
26	1-11	5.117	1.895	0.52	1 2 3 4 5 6 7	0 4 13 12 20 39 12	+
2	2-1	5.792	1.379	0.50	1 2 3 4 5 6 7	1 2 4 6 15 46 27	+
6	2-2	5.406	1.313	0.58	1 2 3 4 5 6 7	11 48 23 9 7 1 0	-
9	2-3	5.269	2.677	0.56	1 2 3 4 5 6 7	5 4 7 7 21 31 24	+
13	2-4	6.412	0.736	0.36	1 2 3 4 5 6 7	56 36 5 2 1 0 0	-



Appendix A continued: Item Analysis for Sense of Coherence Scale

Question	Scale Item	Item Mean	Item variance	Item-scale Correlation	Range	% of Subjects Selected	Direction
18	2-5	5.847	1.214	0.48	1 2 3 4 5 6 7	0 1 4 5 19 41 30	+
20	2-6	6.088	1.346	0.63	1 2 3 4 5 6 7	42 40 11 4 1 1 2	-
23	2-7	6.166	1.911	0.42	1 2 3 4 5 6 7	58 24 8 3 3 2 2	-
25	2-8	5.006	2.00	0.61	1 2 3 4 5 6 7	10 36 20 20 7 5 2	-
27	2-9	6.315	0.781	0.52	1 2 3 4 5 6 7	48 41 8 1 0 1 0	-
29	2-10	6.143	1.116	0.67	1 2 3 4 5 6 7	1 0 2 4 9 41 43	+
4	3-1	6.133	1.343	0.53	1 2 3 4 5 6 7	48 33 10 4 3 1 1	-
7	3-2	6.370	1.129	0.54	1 2 3 4 5 6 7	61 26 6 4 1 0 1	-



Appendix A continued: Item Analysis for Sense of Coherence Scale

Question	Scale Item	Item Mean	Item variance	Item-scale Correlation	Range	% of Subjects Selected	Direction
8	3-3	6.130	0.983	0.63	1 2 3 4 5 6 7	0 1 1 5 7 46 39	+
11	3-4	5.968	0.999	0.65	1 2 3 4 5 6 7	32 43 18 5 1 1 0	-
14	3-5	6.425	0.699	0.60	1 2 3 4 5 6 7	59 31 6 4 1 0 0	-
16	3-6	5.627	1.656	0.70	1 2 3 4 5 6 7	26 35 25 6 3 2 2	-
22	3-7	6.584	0.353	0.47	1 2 3 4 5 6 7	0 0 0 1 4 32 63	+
28	3-8	6.143	1.161	0.64	1 2 3 4 5 6 7	0 2 2 2 7 44 42	+



Appendix B:

Item Analysis for Hardiness Scale

Question	Scale Item	Item mean	Item variance	Item-scale Correlation	Range	Percentage Selected	Key
1	1-1	3.435	0.499	0.38	1 2 3 4	3 4 40 53	+
8	1-2	3.695	0.394	0.50	1 2 3 4	78 15 6 1	-
11	1-3	3.289	0.647	0.53	1 2 3 4	49 34 15 2	-
14	1-4	3.692	0.395	0.51	1 2 3 4	77 16 6 1	-
17	1-5	3.653	0.467	0.64	1 2 3 4	75 18 5 2	-
20	1-6	3.091	0.933	0.44	1 2 3 4	44 30 18 8	-
23	1-7	3.471	0.457	0.40	1 2 3 4	1 6 36 56	+
26	1-8	3.718	0.294	0.29	1 2 3 4	1 3 21 76	+
29	1-9	3.844	0.229	0.43	1 2 3 4	88 10 1 1	-



Appendix B continued: Item Analysis for Hardiness Scale

Question	Scale Item	Item mean	Item variance	Item-scale Correlation	Range	Percentage Selected	Key
32	1-10	3.864	0.300	0.41	1 2 3 4	93 3 1 3	-
38	1-11	3.705	0.383	0.37	1 2 3 4	78 17 4 2	-
39	1-12	3.737	0.376	0.36	1 2 3 4	81 15 2 2	-
41	1-13	3.263	0.687	0.54	1 2 3 4	48 33 16 3	-
44	1-14	3.526	0.555	0.52	1 2 3 4	65 25 7 3	-
47	1-15	3.302	0.665	0.55	1 2 3 4	49 37 10 4	-
50	1-16	3.172	0.707	0.49	1 2 3 4	41 41 14 5	-
3	2-1	3.399	0.506	0.37	1 2 3 4	2 8 38 52	+
4	2-2	3.630	0.279	0.33	1 2 3 4	0 2 47 45	+
5	2-3	3.354	0.475	0.48	1 2 3 4	2 6 47 45	+



Appendix B continued: Item Analysis for Hardiness Scale

Question	Scale Item	Item mean	Item variance	Item-scale Correlation	Range	Percentage Selected	Key
7	2-4	3.857	0.226	0.44	1 2 3 4	90 6 3 1	-
10	2-5	3.360	0.646	0.47	1 2 3 4	54 31 12 3	-
13	2-6	3.581	0.549	0.37	1 2 3 4	71 19 7 3	-
16	2-7	2.838	1.019	0.44	1 2 3 4	32 32 23 12	-
19	2-8	3.795	0.286	0.50	1 2 3 4	84 13 1 2	-
22	2-9	3.523	0.353	0.31	1 2 3 4	0 4 38 57	+
25	2-10	3.705	0.260	0.33	1 2 3 4	0 2 25 73	+
28	2-11	3.182	0.499	0.46	1 2 3 4	34 53 12 2	-
31	2-12	3.737	0.350	0.49	1 2 3 4	80 16 3 2	-
34	2-13	3.649	0.591	0.45	1 2 3 4	78 13 4 5	-



Appendix B continued: Item Analysis for Hardiness Scale

Question	Scale Item	Item mean	Item variance	Item-scale Correlation	Range	Percentage Selected	Key
35	2-14	3.078	0.773	0.48	1 2 3 4	40 31 26 3	-
42	2-15	3.276	0.817	0.42	1 2 3 4	53 27 14 6	-
45	2-16	3.627	0.461	0.51	1 2 3 4	72 19 6 2	-
48	2-17	3.393	0.609	0.45	1 2 3 4	55 31 11 3	-
2	3-1	3.620	0.365	0.34	1 2 3 4	0 6 26 68	+
6	3-2	3.383	0.568	0.51	1 2 3 4	52 36 9 3	-
9	3-3	2.773	0.942	0.59	1 2 3 4	26 39 23 13	-
12	3-4	2.779	1.029	0.28	1 2 3 4	30 31 26 13	-
15	3-5	3.107	0.842	0.47	1 2 3 4	43 30 22 5	-
18	3-6	2.659	0.913	0.43	1 2 3 4	20 39 27 14	-



Appendix B continued: Item Analysis for Hardiness Scale

Question	Scale Item	Item mean	Item variance	Item-scale Correlation	Range	Percentage Selected	Key
21	3-7	1.828	0.597	0.31	1 2 3 4	3 15 45 37	-
24	3-8	3.192	0.616	0.40	1 2 3 4	3 14 44 39	+
27	3-9	2.581	0.763	0.42	1 2 3 4	11 36 38 15	+
30	3-10	3.202	0.702	0.56	1 2 3 4	42 41 11 5	-
33	3-11	1.854	0.625	0.38	1 2 3 4	2 18 42 37	-
36	3-12	2.896	0.801	0.60	1 2 3 4	28 42 22 8	-
37	3-13	2.675	1.050	0.49	1 2 3 4	26 30 28 15	-
40	3-14	2.744	0.847	0.46	1 2 3 4	22 40 27 10	-
43	3-15	3.594	0.442	0.52	1 2 3 4	68 26 4 2	-
46	3-16	3.692	0.304	0.24	1 2 3 4	73 23 4 0	-
49	3-17	2.682	1.152	0.48	1 2 3 4	29 27 26 18	-



Appendix C

Item Analysis: Organisational Climate Questionnaire

Question	Scale Item	Item Mean	Item variance	Item-scale Correlation	Range	Percentage of Subjects Selected	Direction
1	1-1	3.260	1.303	0.740	1 2 3 4 5	6 28 8 49 9	+
17	1-2	3.971	0.626	0.460	1 2 3 4 5	2 4 8 66 20	+
33	1-3	2.782	1.300	0.710	1 2 3 4 5	6 26 17 40 11	-
49	1-4	3.156	1.158	0.730	1 2 3 4 5	4 32 15 42 7	+
65	1-5	2.666	1.430	0.670	1 2 3 4 5	4 30 11 37 18	-
2	2-1	3.458	1.086	0.690	1 2 3 4 5	4 21 9 56 9	+
18	2-2	4.101	0.811	0.570	1 2 3 4 5	1 8 6 50 35	+
34	2-3	3.721	1.442	0.650	1 2 3 4 5	29 43 5 19 5	-
50	2-4	3.682	1.139	0.660	1 2 3 4 5	3 18 8 51 20	+
66	2-5	3.016	1.406	0.660	1 2 3 4 5	8 37 14 31 10	-



Appendix C continued: Item Analysis for Organisational Climate Questionnaire

Question	Scale Item	Item Mean	Item variance	Item-scale Correlation	Range	Percentage of Subjects Selected	Direction
3	3-1	3.834	1.489	0.650	1 2 3 4 5	36 39 4 16 5	-
19	3-2	4.140	0.601	0.680	1 2 3 4 5	0 6 5 58 31	+
35	3-3	3.620	1.210	0.700	1 2 3 4 5	3 20 10 47 20	+
51	3-4	3.896	0.859	0.760	1 2 3 4 5	1 12 8 55 24	+
67	3-5	3.802	0.899	0.610	1 2 3 4 5	2 13 6 61 18	+
4	4-1	4.101	0.844	0.620	1 2 3 4 5	2 8 5 51 35	+
20	4-2	4.231	0.625	0.660	1 2 3 4 5	1 4 6 50 39	+
36	4-3	3.497	1.088	0.610	1 2 3 4 5	12 52 14 18 4	-
52	4-4	3.799	0.661	0.620	1 2 3 4 5	1 8 12 66 13	
68	4-5	3.737	0.830	0.570	1 2 3 4 5	2 12 11 61 14	+
5	5-1	3.841	1.088	0.690	1 2 3 4 5	4 11 8 51 26	+



Appendix C continued: Item Analysis for Organisational Climate Questionnaire

Question	Scale Item	Item Mean	Item variance	Item-scale Correlation	Range	Percentage of Subjects Selected	Direction
21	5-2	3.740	0.959	0.730	1 2 3 4 5	3 11 13 55 18	+
37	5-3	3.279	1.149	0.550	1 2 3 4 5	6 22 15 50 6	+
53	5-4	3.584	0.983	0.730	1 2 3 4 5	5 8 28 44 16	+
69	5-5	4.032	0.798	0.660	1 2 3 4 5	30 53 9 6 2	-
6	6-1	3.068	1.648	0.670	1 2 3 4 5	13 28 12 34 13	+
22	6-2	3.705	1.169	0.790	1 2 3 4 5	4 15 8 52 21	+
38	6-3	3.023	1.509	0.700	1 2 3 4 5	13 28 11 40 8	+
54	6-4	3.932	0.823	0.730	1 2 3 4 5	2 7 10 57 24	+
70	6-5	3.695	1.004	0.680	1 2 3 4 5	2 16 10 55 17	+
7	7-1	3.672	1.110	0.660	1 2 3 4 5	1 22 4 54 19	+
23	7-2	3.591	1.073	0.740	1 2 3 4 5	3 17 14 50 16	+



Appendix C continued: Item Analysis for Organisational Climate Questionnaire

Question	Scale Item	Item Mean	Item variance	Item-scale Correlation	Range	Percentage of Subjects Selected	Direction
39	7-3	3.308	1.428	0.720	1 2 3 4 5	7 27 9 44 14	+
55	7-4	3.403	1.390	0.700	1 2 3 4 5	5 26 9 43 17	+
71	7-5	3.123	1.270	0.650	1 2 3 4 5	7 44 10 33 6	-
8	8-1	4.000	0.734	0.540	1 2 3 4 5	1 9 6 58 26	+
24	8-2	3.782	0.670	0.600	1 2 3 4 5	1 9 13 65 12	+
40	8-3	3.357	1.346	0.680	1 2 3 4 5	14 44 10 26 5	-
56	8-4	2.812	1.211	0.680	1 2 3 4 5	5 27 23 34 11	-
72	8-5	2.734	1.228	0.670	1 2 3 4 5	11 42 14 29 4	+
9	9-1	3.938	0.973	0.580	1 2 3 4 5	2 12 5 53 28	+
25	9-2	2.877	1.543	0.660	1 2 3 4 5	8 32 11 34 14	-
41	9-3	4.110	0.605	0.600	1 2 3 4 5	1 4 7 59 29	+



Appendix C continued: Item Analysis for Organisational Climate Questionnaire

Question	Scale Item	Item Mean	Item variance	Item-scale Correlation	Range	Percentage of Subjects Selected	Direction
57	9-4	3.523	1.061	0.430	1 2 3 4 5	11 57 8 21 3	-
73	9-5	3.081	1.243	0.580	1 2 3 4 5	6 41 17 28 8	-
10	0-1	2.708	1.402	0.740	1 2 3 4 5	18 31 19 28 5	+
26	0-2	3.188	1.263	0.560	1 2 3 4 5	5 31 12 43 9	+
42	0-3	3.114	1.276	0.770	1 2 3 4 5	6 31 17 37 9	+
58	0-4	3.140	1.120	0.770	1 2 3 4 5	5 28 20 40 6	+
74	0-5	3.347	0.928	0.630	1 2 3 4 5	4 19 19 53 4	+
11	1-1	3.951	0.839	0.700	1 2 3 4 5	1 10 6 57 25	+
27	1-2	4.266	0.656	0.690	1 2 3 4 5	1 4 3 50 42	+
43	1-3	3.867	0.986	0.650	1 2 3 4 5	2 12 9 51 26	+
59	1-4	3.906	1.254	0.770	1 2 3 4 5	35 41 9 11 4	-



Appendix C continued: Item Analysis for Organisational Climate Questionnaire

Question	Scale Item	Item Mean	Item variance	Item-scale Correlation	Range	Percentage of Subjects Selected	Direction
75	1-5	3.851	1.017	0.760	1 2 3 4 5	3 12 8 53 25	+
12	2-1	3.523	1.055	0.660	1 2 3 4 5	15 46 18 19 2	-
28	2-2	2.851	1.750	0.610	1 2 3 4 5	9 34 9 28 20	-
44	2-3	3.692	1.012	0.640	1 2 3 4 5	16 59 7 15 3	-
60	2-4	3.562	1.207	0.610	1 2 3 4 5	18 47 10 22 3	-
76	2-5	2.977	1.438	0.450	1 2 3 4 5	7 40 6 38 9	-
13	3-1	3.253	1.332	0.610	1 2 3 4 5	6 28 14 41 12	+
29	3-2	3.792	1.249	0.770	1 2 3 4 5	3 15 11 42 30	+
45	3-3	3.727	1.036	0.790	1 2 3 4 5	3 11 19 45 22	+
61	3-4	3.711	1.374	0.800	1 2 3 4 5	28 40 11 16 5	-
77	3-5	4.049	0.709	0.720	1 2 3 4 5	2 5 7 59 27	+



Appendix C continued: Item Analysis for Organisational Climate Questionnaire

Question	Scale Item	Item Mean	Item variance	Item-scale Correlation	Range	Percentage of Subjects Selected	Direction
14	4-1	3.841	1.010	0.760	1 2 3 4 5	2 12 10 51 25	+
30	4-2	4.208	0.541	0.630	1 2 3 4 5	1 2 4 59 33	+
46	4-3	4.143	0.850	0.670	1 2 3 4 5	2 7 5 47 39	+
62	4-4	3.370	1.818	0.700	1 2 3 4 5	9 26 8 32 25	+
78	4-5	3.542	1.170	0.730	1 2 3 4 5	4 19 9 53 14	+
15	5-1	3.260	1.322	0.800	1 2 3 4 5	7 24 17 41 12	+
31	5-2	3.347	1.454	0.690	1 2 3 4 5	6 26 12 39 17	+
47	5-3	3.156	1.300	0.820	1 2 3 4 5	9 22 21 39 9	+
63	5-4	3.341	1.238	0.750	1 2 3 4 5	5 26 10 49 10	+
79	5-5	3.448	1.273	0.790	1 2 3 4 5	6 17 16 46 15	+
16	6-1	3.932	0.713	0.390	1 2 3 4 5	3 3 14 59 21	+



Appendix C continued: Item Analysis for Organisational Climate Questionnaire

Question	Scale Item	Item Mean	Item variance	Item-scale Correlation	Range	Percentage of Subjects Selected	Direction
32	6-2	3.584	1.496	0.700	1 2 3 4 5	7 17 10 43 24	+
48	6-3	3.276	1.667	0.780	1 2 3 4 5	12 22 7 43 15	+
64	6-4	3.513	1.334	0.750	1 2 3 4 5	6 18 17 40 20	+
80	6-5	3.419	1.419	0.600	1 2 3 4 5	7 21 14 41 18	+