

**A Study on the Effectiveness of the Orientation Process and
Cross-cultural Training for the Expatriate**

By

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DECLARATION

I declare that this research report is my own, unaided output. It is submitted in partial fulfillment of the requirements for the degree of Masters of Business Administration (MBA) in the University of Kwa-Zulu Natal, Durban. It has not been submitted before for any degree or examination in any other University.

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ABSTRACT

Over the years, a number of studies have identified the failure of expatriates – the early termination of an international assignment – as a major problem for multinational enterprises (MNE). MNE's in, for example the USA, have reported expatriate failure rates as high as 40 percent for assignments to developed countries and 70 percent when assignments are in developing countries. These failures can cost the MNE three times the expatriates' annual salary plus the cost of the relocation. Even if an expatriate stays the full duration of an international assignment it has been determined that many, as much as 50 percent, operate at less than optimal levels of productivity. International studies have, however shown that if expatriates are properly prepared, supported and trained, the success of their assignment can be ensured.

The presented study focuses on the effectiveness of the orientation process and cross-cultural training (CCT) and its impact on cross-cultural adjustment for the expatriate. The objective of this study is to evaluate the effectiveness of the orientation process for expatriates and to determine a need for a separate orientation and culture training. By improving the orientation process and identifying a need for culture specific training, the company can thus eliminate relocation and replacement costs.

A further objective of this research is to design a guideline for the implementation of a culture specific orientation process for the expatriate. This will be done based on the recommendations made by the candidates questioned.

In order to determine the preparation and training needs of expatriates this formal study was undertaken, consisting of a literature study as well as an empirical study. At first a literature study was conducted in order to determine what was happening internationally in respect to expatriation and expatriation preparation and training. The background of the study reviews what has been written and said in the areas of cross-cultural training, cross-cultural adjustment, the orientation process and the expatriate. The study highlights

specific issues regarding cultural training, assignment failure and success, and the expatriate experience.

The research is motivated by the need to reduce assignment failure and the subsequent costs associated with expatriation, and ensure smooth transition into a new culture. The research methodology utilized was qualitative, based on e-mailed questionnaires and personal interviews. The study attempts to recommend, based on the findings, a culture centred orientation process for the expatriate.

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CHAPTER 1: OVERVIEW

1.1 Introduction

As enterprises develop globally, there is a growing challenge to utilise expatriates on international assignments to complete strategically significant tasks (Brewster 1998; Downes and Thomas 1999; Gregersen and Black 1992). Multinational corporations (MNCs) utilise expatriates, not only for reasons of corporate organization and expertise in critical global markets, but also to smooth the process of entry into new markets or to extend international management abilities (Bird and Dunbar 1991; Boyacigiller 1991; Forster 2000; Rosensweig 1994; Shaffer, Harrison and Gilley 1999). For that reason, in order to maintain competitive in today's international marketplace, enterprises not only acknowledge that transferring competent employees adds crucial skill and knowledge to their overseas performances, enabling them to compete more efficiently in all international positions, but also expatriate employees, particularly managerial and professional employees, are vital to the success of overseas assignments such as implementing international corporate tactics and managing and coordinating subsidiaries (Black, Gregersen and Mendenhall 1992). Expatriates are able to play tremendously significant roles during worldwide assignments.

Expatriating employees out of the parent company to work in an overseas subsidiary serve three major functions: filling staff vacancies, management development and organizational development (Edstrom and Galbraith 1997; Ondrack 1985; Tung 1982).

Expatriates undertake executive practices in an unfamiliar work context; deal with a different mode of life and experience profound personal transformation. 'Culture shock', the stress and alienation experienced when confronted with normally incomprehensible surroundings (Odberg 1960), sets the expatriate job apart from other jobs and is repeatedly revealed as the primary cause of an ineffective or unsuccessful expatriate assignment. As a result a great deal of expatriate management literature has paid

attention to the management of cross cultural adjustment (Berry, Kim and Boski 1998; Black and Gregerson 1991; Harris and Moran 1989). This focus appears reasonable when the high cost of expatriate failure, attributed to incapability to adjust (Adler 1986), is well considered. Expatriates are regarded to have “failed” in their overseas assignment if they return to the parent company prematurely.

In fact virtually 40 percent of American expatriates return earlier than they planned (Kealey 1996). A number of factors may contribute to this phenomenon, including difficulty in adjusting to different physical or cultural environments, family-related problems, personality or emotional maturity issues, job-related technical competence, and lack of motivation to work overseas. For both employees and their families, adjusting to life overseas can be regarded as a significant barrier (Black and Gregerson 1991; Tung 1988). Adjustment literature (Black 1998; Nicholson and Imaizumi 1993; Shaffer and Harrison 1998) suggests that expatriates who do not adjust satisfactorily to their international assignments will not function well, will withdraw psychologically, and will almost certainly return prematurely. The better adjusted expatriates are, the more likely they will be able to complete their overseas assignment (Kramer, Wayne and Jaworski 2001; Stroh, Dennis and Cramer 1994). Accordingly, well adjusted expatriates will be more competent in and committed to their new job because they experience less stress and better cultural integration (Aycan 1997b). An expatriate’s successful adjustment to the host culture environment is shown over and over again to be the leading determinant of an expatriate’s job performance. For this reason, the importance of cross-cultural training can not be over-emphasised.

1.2 Background of the Research

As the world continues to become globalised, firms are being required to manage an increasingly diverse workforce with expatriation being just a subset of this challenge. As more and more companies go global, the expatriates who help to run overseas operations are becoming an increasingly critical asset, often making the difference between a company’s success and failure in the marketplace. Any workplace in any society in the

world is always a very dynamic and complex environment with a host of variables and forces at work that influence social interaction patterns and resultant levels of productivity and performance. The cross cultural workplace has an even higher level of dynamic complexity because you have culture shaped institutional structures and norms interacting with people of different cultures.

It is a fairly common organisational practice to ship expatriate families abroad with hardly any or no preparation for the substantial transitions they are to experience. Yet troubles with culture adaptation are one of the major reasons why expatriate assignments fail. International assignees would be better equipped to handle cultural adjustments if organisations were more consistent in providing pre-departure culture and language training programs. An effective pre-departure culture and language orientation program can be developed that would adequately prepare expatriates and their families.

Employees to be assigned overseas should be given cross-cultural training so that they will be able to deal with difficulties associated with living and working in another country. Potential problems include family lifestyle adjustment, social relations, on-the-job-communications, and negotiation styles. Organisational support for international employees can improve the success rate of these expatriates. With personnel who are equipped to deal with global issues, companies can better cope with the increasing globalisation of the business world.

Most business leaders focus on the functional skills needed for international work and overlook the importance of cultural knowledge. But most expatriate failures aren't caused by problems with job skills. They are caused by an inability to adapt to an unfamiliar culture.

This study focuses on the usefulness of the orientation process for the expatriate and its contribution to the successfulness of an overseas assignment.

Companies today are challenged to expand globally. Employees often work outside their country of origin or work with employees from other countries. Expatriate is a term

generally used for employees sent by a company in one country to manage operations in a different country. Once an expatriate manager has been selected, it is necessary to prepare that manager for the upcoming assignment. Because these individuals already possess job-related skills, some firms have focused development efforts on cross cultural training. However, cultural training is hardly universal. According to one 1995 survey, nearly 40 percent of the respondents offered no cross cultural preparation to expatriates. Cross cultural preparation involves educating expatriates and their families who are to be sent to a foreign country. To successfully conduct business in the global marketplace, the employees must understand the business practices and the cultural norms of different countries (Noe, 2000).

1.3 Motivation for the Research

The main objective of this research is to design a guideline for the implementation of a culture specific orientation process for the expatriate. A survey by the Simon Fraser University in British Columbia (Fishman, 1996) was conducted to evaluate the expectations of expatriates assigned in overseas operations and how they felt about their jobs in such settings. Results from some 409 employees from 49 multinational companies revealed that while most reviewed overseas assignment as positive, more than 2 out of 3 believed that they could have been better prepared through cross cultural training and information. The lack of information and training not only adds to the stress of relocation but also extends the time it takes for expatriates to feel comfortable in their new environment. Furthermore, the survey found out that while expatriates generally enjoy working overseas, more than two thirds believe that their companies are not doing a satisfactory job of providing a clear preview of what to expect from assignments. In addition two-thirds said that companies do not pay enough attention to cross cultural training. This lack of information and training not only adds to the stress of relocation but also extends the time it takes for expatriates to feel comfortable in their new surroundings. Managers need to consider the effect of such neglect on productivity (Fishman, 1996).

To be successful in overseas assignments, expatriates need to be:

- Competent in their area of expertise.
- Able to communicate verbally and non-verbally in the host country.
- Flexible, tolerant of ambiguity, and sensitive to cultural differences.
- Motivated to succeed, able to enjoy the challenge of working in other countries, and willing to learn about the host country's culture, language and customs.
- Supported by their families (Arthur & Bennet, 1995)

One reason for U.S expatriates' high failure rate is that companies place more emphasis on developing employees' technical skills than on preparing them to work in other cultures (Noe, 2000).

Noe et al (2000) states that foreign assignments consists of three phases: 1.pre-departure. 2. On-site. 3. Repatriation. Pre-departure is of particular relevance to this study as, at this stage, the employees need to receive language training and an orientation in the new country's culture and customs. It is critical that the family be included in the orientation programmes. Cross cultural training methods range from presentational techniques, such as lectures that expatriates and their families attend on the customs and culture of the host country to actual experiences in the home country in culturally diverse communities.

1.4 Value of the Project

Effective cross cultural training helps ease an expatriate's transition to the new work environment and reduces assignment failure. The overarching goal is to make participants more effective in overseas, cross-cultural, or multicultural situations. The second goal is the ability to communicate effectively. The third goal is to establish interpersonal relationships.

With the exorbitant costs associated with the expatriation assignment, it's imperative to establish the reasons for possible expatriation failure. The study will attempt to determine whether the orientation process, or lack thereof, and culture diversity are possible causes for assignment failure, thereby saving the company from the associated

costs. The study seeks to understand the importance for the expatriate and seeks to give meaning to their experience.

Mergers, partnerships and alliances with foreign companies, expansions into foreign markets, dealing with foreign suppliers and customers, have all increased the need to improve our cross-cultural literacy. We have to lift our game otherwise we will face constant communication problems, misunderstandings, unnecessary conflicts, missed business opportunities and lost contracts. Without improved cross-cultural skills we will appear rude, ignorant, weird, unprofessional and unreliable, to people whose culture and outlooks we don't understand, and who in turn don't understand our culture, customs or business methods.

1.5 Problem Statement

With globalisation, expatriation is becoming increasingly important and with the costs involved in this process, it is imperative to be properly oriented and with not just with the company, but with the culture of the country as well. The aim of this study is to look at the orientation process and to provide a set of guidelines for proper cross cultural training. This study aims to study the effect that cultural orientation has on the successfulness of the assignment.

1.6 Objectives of the Study

The objective of this study is to evaluate the effectiveness of the orientation process for expatriates and to determine a need for a separate orientation and culture training. Furthermore, to establish a need for a web based company specific expatriate site. By improving the orientation process and identifying a need for culture specific training, the company can thus eliminate relocation and replacement costs.

1.7 Research Methodology

Qualitative research methodology was utilised in this study. The details relevant to the study are highlighted in chapter three. Qualitative research involves the use of qualitative data, such as interviews, documents, and participant observation data, to understand and explain social phenomena. Qualitative researchers can be found in many disciplines and fields, using a variety of approaches, methods and techniques (Kaplan & Maxwell, 1994).

Qualitative research methods were developed in the social sciences to enable researchers to study social and cultural phenomena. Examples of qualitative methods are action research, case study research and ethnography. Qualitative data sources include observation and participant observation (fieldwork), interviews and questionnaires, documents and texts, and the researcher's impressions and reactions (Kaplan & Maxwell, 1994).

Qualitative research methods are designed to help researchers understand people and the social and cultural contexts within which they live. Kaplan and Maxwell (1994) argue that the goal of understanding a phenomenon from the point of view of the participants and its particular social and institutional context is largely lost when textual data are quantified (Kaplan & Maxwell, 1994).

A research method is a strategy of inquiry which moves from the underlying philosophical assumptions to research design and data collection. The choice of research method influences the way in which the researcher collects data. Specific research methods also imply different skills, assumptions and research practices. The four research methods include action research, case study research, ethnography and grounded theory.

1.8 Limitations of the Research

1. The availability of company specific information. The reluctance of companies to divulge sensitive and confidential information. It was, therefore, difficult to concentrate on a specific company.

2. Lack of availability of candidates. Following from the above, it was difficult to get the Human Resource department to buy-in and it was therefore difficult to contact all/any expatriates within an organisation.
3. The expatriation process is an ongoing experience and the recommendations that some candidates made were based on their experiences at that time. Some were recent expatriates whereas others were no strangers to expatriation. Therefore, recommendations were based on the sum of their experiences at that point in time and would have changed since final contact with them.

1.9 Subsequent Chapters of the Research Report

Chapter 2

The study will be presented in different chapters. Chapter 2 is the theoretical part of the thesis and gives a review of what has been written and said in the areas of the orientation process and cross-cultural training and the expatriate.

This chapter will expand on the orientation process in general. It will also expand on expatriates and build in terms of new research, theories and models.

Chapter 3

Chapter 3 will concentrate on the research framework regarding cross-cultural training. This chapter builds on the preceding chapter, culminating in a proposed model for cross cultural training.

Chapter 4

This chapter expands on the research methodology applied to the study. Attempts are also made to apply the model proposed in Chapter 3 to the sample group.

Chapter 5

Chapter 5 analyses the results of the study. Have the sample group reviewed in Chapter Four been products of a successfully implemented expatriate orientation programme and is there room for improvement? What are the results of the interviews and e-mailed questionnaires? What recommendations have the expatriates put forward to improve the process? These questions will be addressed in this chapter.

Chapter 6

The research attempts to recommend, based on the findings, a culture centred orientation process for the expatriate. The focus should be not just on the company and its value but the country and its culture, including the political, legal and economic attributes. Furthermore, recommendations will be made, based on the findings, and the scale of the global company, for a web based orientation programme prior to the expatriate arriving in the country.

1.10 Conclusion

As multinational enterprises (MNEs) increase in number and influence, the role of expatriates in those MNEs also develops in significance (Dowling et al 1994). Success on a global assignment is greatly influenced by an expatriate's cross cultural adjustment to the host country (Black and Mendenhall 1990; Caligiuri 1997; Kealey and Protheroe 1996; Sappinen 1993). Cross cultural adjustment is positively related to performance on the assignment and negatively related to premature termination of the assignment (Black 1988; Caligiuri 1997; Tung 1981). Forster (1997) specifically highlighted several possible implications of poor expatriate cross-cultural adjustment, including inadequate performance, psychological stress, and negative effects on the expatriates' families, and long term career repercussions upon repatriation from failed expatriate assignments. It is for this reason that this study focuses on the orientation process and cross-cultural training as a means to facilitate effective cross cultural adjustment.

CHAPTER 2: LITERATURE REVIEW

2.1 Introduction

With globalization, international assignments have always played an important role in the operations and activities of multinational companies. A lot of enterprises have invested their ventures in foreign countries to avoid the high cost of land and labour, as well as the shortage of manpower. The research literature on international expatriates is reasonably consistent in reporting rather high failure rates among these expatriates (Black, 1998; Dunbar and Ehrlich, 1986). The costs related to these expatriate failures are relatively high as well (Black, 1998; Oddou, 1991; Stone, 1991; Wederspahn, 1992). It has been estimated that the first year cost of posting expatriates on international assignments is no less than three times the base salaries of their domestic counterparts (Wederspahn, 1992). However, sixteen percent to forty percent of overseas assignments are still not successful in the end (Black, 1988), and costs of expatriates have increased from as much as US\$250,000 a decade ago (Copeland and Griggs 1985) to US\$1 million per failure for U.S. enterprises (Shannonhouse, 1996). Even though the cost of expatriates is fairly high, MNCs are increasingly using plenty of expatriates as an international strategy, not only for traditional control and expertise reasons, but also to overcome barriers and smooth the progress of entry into new markets (Torbiorn, 1994).

Due to the internationalization process, enterprises should endeavour to provide an adequate expatriation programme for expatriates due to the fact that working in a new environment that is dissimilar to that of the parent company, expatriates are often faced with an entirely new work role, with increased challenges, opportunities and prestige, as well as more responsibilities and pressures to perform (Harvey, 1985).

The main intention of this section is to present a general background on the available academic literature that relates to the study and explores: (1) reasons for expatriate assignment failure, (2) the orientations process; and (3) cross cultural training and its impact on cross cultural adaptation.

Before we look at the issue of orientation and cross cultural training it is crucial that we identify the factors that contribute to assignment failure.

2.2 Reasons for Assignment failure

Expatriate relocation assignments fail for a variety of reasons as the chart below shows.

In a study conducted by Tung (1987), the following factors were identified as causes of expatriate failure:

Main Reasons for Expatriate Failure
1) Inability of manager's spouse to adjust to the new environment
2) The manager's inability to adapt to the new environment
3) Other family related issues
4) The manager's personality or emotional immaturity
5) The manager's inability to cope with responsibilities associated with the overseas work
6) The manager's lack of technical competence

Table 1: Tung's (1987) Main Reasons for Expatriate Failure

One of the main reasons for effective cultural training is to help control the failure rate of expatriate managers. Defined as the premature return by an expatriate from an overseas assignment, failure rates are between 25 and 40 percent when the expatriate is assigned to a developed country and a whopping 70 percent when the expatriate is assigned to a still-developing country (Shay and Tracey, 1997). An overwhelming majority of these failures is attributed to the expatriate's and/or spouse's inability to adapt to the new culture (Thomas, 1998; Tung, 1988).

Costs associated with expatriate failure run high. Depending on the job or the location, estimates of the direct cost of premature returns by expatriate managers is between \$250,000 and \$1 million. Taken as a whole, expatriate failure in MNCs runs in the billions of dollars. In addition, there are unknown and indirect costs associated with expatriate failure in terms of the disruptions and missed opportunities in developing markets and revenues abroad (Harrison, 1994).

Research and analysis of expatriate relocations has highlighted how 'culture shock', i.e. being impacted by cross cultural differences, can negatively impact upon a relocation assignment if not properly managed. These cross cultural differences affect both the employee and his/her spouse or family.

Cross cultural training can and does reduce the chances of expatriate relocations going wrong. Employees have now realised the importance of intercultural understanding and its potential impact upon relocations, as highlighted in the chart below. Cultural training aids the employee and family to better approach and deal with the relocation, ensuring that the negative consequences of 'culture shock' are greatly reduced.

The importance of cross cultural training is clear. Feedback from those who have undertaken cross cultural training overwhelmingly indicates that it is of great benefit. If global companies are to truly maximise their potential abroad, cross cultural training must become a mandatory element of expatriate relocation assignments. To ignore this would mean a continuation of failures, loss of potential growth abroad and a staff base that lacks international cultural competencies.

The importance of developing expatriate managers for their overseas assignment through the utilization of cross-cultural training seems apparent. Considerable research supports that cultural training can have a positive effect on cultural adjustment and expatriate performance (Frazee, 1999; Deshpande and Viswesvaran, 1992). Caudron (1991:27-30) highlights some specific dimensions which cultural training can help in reducing costly expatriate failure and increase the effectiveness of their assignment:

. *Negotiation styles.* Expatriates should be made aware that negotiation styles vary widely from country to country. For example, in Russia negotiations are conflict oriented. However, in Asian cultures, more of a consensus-oriented negotiating style is more appropriate.

. *Communication.* In the USA, business associates have a tendency to address each other by first names right after being introduced. However, in France it may take three to six months before business associates feel comfortable addressing each other without a formal title. Non-verbal cues can also be barriers to effective communication. For

example, standing too far from a Middle Easterner or standing too close to a Spaniard can be interpreted by both as a lack of interest.

. *Social relations.* Americans tend to place a high value on informality as a way of creating a comfortable environment. Conversely, Europeans tend to be more formal, both in dress and demeanor, while conducting business or entertaining guests. As a result, Europeans may interpret the informal environment as a sign of disrespect. On the other hand, Americans may interpret European formality as stiff and unfriendly.

. *Family lifestyle adjustment.* Concerns associated with everyday lifestyle adjustment in another country, such as where to shop, how to get the kids to school, and how to decode the public transportation system can be quite stressful for expatriates and their families.

2.3 Orientation Process

Orientation is the planned introduction of new employees to their work environment and co-workers. However, since all employees are different, a sensitive awareness to anxieties, uncertainties and needs is important. Orientation should not be a mechanical process. http://its.ucsf.edu/about/business/hr/orientation_process.jsp

The overall goal of orientation is to help new employees learn about their new work environment and get their performance up to acceptable levels as soon as possible. This impression begins even before the new employee reports to work. Providing sufficient information about when and where to report the first day, handling all relevant paperwork efficiently, and having personable and efficient individuals assist the new employee, all contribute to creating a favorable impression of the Company'. http://its.ucsf.edu/about/business/hr/orientation_process.jsp

The general ideas that follow highlight the major components of an effective orientation system: preparing for new employees, providing them with needed information, presenting orientation information effectively and conducting evaluation and follow-up on the initial orientation.

Often new employees receive a large amount of information, some of which they may not immediately need, and at times might fail to get the information they really need the first day. Human Resources (HR) uses an orientation checklist which indicates items to be covered by the HR unit and the new employee's supervisor or manager. Using an orientation checklist will ensure that all necessary items have been covered. The employee signs the checklist to verify that they have been informed of all pertinent information. http://its.ucsf.edu/about/business/hr/orientation_process.jsp

Orientation is used for the following purposes:

- **To Reduce Startup-Costs:** Proper orientation can help the employee get "up to speed" much more quickly, thereby reducing the costs associated with learning the job.
- **To Reduce Anxiety:** Any employee, when put into a new, strange situation, will experience anxiety that can impede his or her ability to learn to do the job. Proper orientation helps to reduce anxiety that results from entering into an unknown situation, and helps provide guidelines for behaviour and conduct, so the employee doesn't have to experience the stress of guessing.
- **To Reduce Employee Turnover:** Employee turnover increases as employees feel they are not valued, or are put in positions where they can't possibly do their jobs. Orientation shows that the organization values the employee, and help provide tools necessary for succeeding in the job.
- **To Save Time for Supervisor and Co-Workers:** Simply put, the better the initial orientation, the less likely supervisors and co-workers will have to spend time teaching the employee.
- **To Develop Realistic Job Expectations, Positive Attitudes and Job Satisfaction:** It is important that employees learn early on what is expected of them, and what to expect from others, in addition to learning about the values and attitudes of the organization. While people can learn from experience, they will make many mistakes that are unnecessary and potentially damaging. <http://www.work911.com/articles/orient.htm>

Basic Elements of the Orientation Process

- Orientation should begin with the most important information (basic job survival).
- Orientation should emphasize people as well as procedures and processes. Employees should have a chance to get to know people and their approaches and styles in both social and work settings.
- Buddy an employee to a more experienced person, but make sure the more experienced person wants to buddy up, and has the inter-personal skills. This provides ongoing support.
- Introduce employees to both information and people in a controlled way. A new employee can't absorb everything at once, so don't waste your time. Space out introductions. <http://www.work911.com/articles/orient.htm>

Conclusion

Orientation, or lack of it, will make a significant difference in how quickly an employee can become more productive, and also has long term effects for the organization. Orientation is complex and essential for any new employee. However, it is even more necessary and complex when the cross-cultural element of the expatriate comes into play.

It is for this reason that the various elements of cross cultural training will be explored. Learning orientation is of particular relevance to expatriate cross cultural adjustment. A pre-requisite is for the expatriate to have a high level of learning orientation. The following two sections elaborates on learning orientation as well as organizational socialization.

2.3.1 Learning Orientation

The dictionary defines learning as 'the acquiring of knowledge' (Websters II New Riverside University Dictionary 1984). It encompasses both the acquisition of 'know-how', which implies the physical ability to produce some action, and the acquisition of

'know-why', or the ability to articulate conceptual understanding of an experience. Learning orientation is an identifiable tendency and one that can be developed through systematic training (Porter and Tansky, 1999). The ability to utilise learning orientation would be an excellent attribute for completing an expatriate assignment successfully, and for positive pre-departure preparation, because it is a constructive method of developing the adjustment for working and living in a different culture. For that reason, an understanding of that dimension is also valuable for developmental purposes. In both selection and employee development processes, MNCs and organisations should endeavour to identify and further develop employees' learning orientation, as these are particularly significant in preparation for expatriate assignment.

The empirical work of VandeWalee and Cummings (1997) in the context of organisations showed a positive relationship between a learning orientation and feedback inquiry frequency. From another viewpoint, as a social learning perspective, Bandura (1986) demonstrated that socialisation occurring in the host company in a foreign country would facilitate cultural understanding. It will simultaneously facilitate cross cultural adjustment.

Expatriates with a strong learning orientation are more likely to demonstrate adaptability and willingness to learn from their experiences and their co-workers during their overseas assignments in a foreign country, and to utilise their abilities to develop the learning of their colleagues and the organisation.

2.3.2 Organisational Socialisation

Organisational socialisation may possibly occur by means of formal organisational schemes and individual efforts that familiarise expatriates with the processes and procedures of the host country organisation. Organisational entry is a critical time for newcomers. A basic premise of organisational socialisation practices is that the nature of a newcomer's initial experiences is imperative to their adjustment to the new environment. Researchers (Choa, et al 1994; Feldman 1981; Ostroff and Kozlowsk 1993)

have recognised that typically there are four phases contained in a newcomer's progress. The first phase is concerned with group processes (social integration). In this phase the newcomers are sensitised to the group norms and values, comprehend the relationships between formal and informal work, and discover the person who is most well-informed and influential in the organisation. At the same time newcomers start to recognise how to relate and fit in. The second phase is concerned with task mastery (performance proficiency). The newcomers learn the tasks involved in the job (knowledge, skills, and capabilities), important duties, assignments, and priorities. In addition, the newcomers comprehend how to deal with regular problems and how to gain important information in this stage. The third phase is related to work roles (role clarification). The newcomers become acquainted with boundaries of authority, responsibility and appropriate behaviours in this stage. The fourth stage is about organisational attributes (acculturation). In this stage the newcomers achieve an appreciation of the politics, power, goals, and value premises of the organisation; knowledge of the organisations mission, special languages, key legends, myths, stories, and management's leadership and motivational style. To sum up, organisation socialisation is a procedure through which the individual adjusts to a particular work role in an organisation by learning content and process. Organisation socialisation is also explained as the procedure by which individuals or newcomers gain information concerning routine or desirable behaviours and perspectives within the work surroundings.

2.4 Cross cultural Training

Usually, cross-cultural training may be defined as any procedure used to enhance an individual's capability to contend with and work in foreign surroundings (Tung 1981). There are many types of training that can be given to people being posted overseas depending upon their objectives, the nature of their responsibilities and duties, the length of their stay and their previous experiences. Kealey and Protheroe (1996, p.149) also stated that 'the effectiveness of various types of training will naturally depend to some extent on the time and resources available for undertaking them, the quality of trainers, and possibilities for in-country training'. A number of the categories of training available

to expatriates are technical training, practical information, area studies, cultural awareness, intercultural effectiveness skills, and interpersonal sensitivity training.

2.4.1 The need for cross-cultural training

Researchers (Black and Mendenhall, 1989; Mendenhall, Dunbar and Oddou, 1987) estimated that 20 to 40 percent of expatriates posted to perform international assignments return prematurely due to the incapability of the expatriate and their spouse to adapt to a new culture and environment. For this reason, cross-cultural training can smooth the progress of efficient adjustment and performance, and is essential for financial and strategic issues. Chen and Starosta (1996) believe that people have to develop their intercultural communication competence in order to live meaningfully and productively in the global village. According to Landis and Brislin (1983), as the workforce in various countries becomes more culturally diverse, it is necessary to train people to become more competent and thus to deal effectively with the complexities of new and different environments. Thus, the issue of cross-cultural training in developing intercultural communication competence can no longer be neglected. People who are sent abroad must develop such competence in order to be successful. Cross-cultural training has long been advocated as a means of facilitating effective cross-cultural interaction (Bochner, 1982; Harris and Moran, 1979; Landis and Brislin, 1983; Mendenhall and Oddou, 1986; Tung, 1981). The importance of such training in preparing an individual for an intercultural work assignment has become increasingly apparent (Baker, 1984; Lee, 1983; Tung, 1981). As Bhagat and Prien (1996, p. 216) put it, "as international companies begin to compete with each other in the global market, the role of cross-cultural training becomes increasingly important." A comprehensive literature review by Black and Mendenhall (1990) found strong evidence for a positive relationship between cross-cultural training and adjustment. In addition, another survey revealed that 86 percent of Japanese multinationals report a failure rate of less than 10 percent for their expatriates who have received training (Hogan and Goodson, 1990).

Numerous benefits can be achieved by giving these expatriates cross cultural training. It is seen as:

- . a distinct advantage for organizations;
- . a means for conscious switching from an automatic, home-culture international management mode to a culturally appropriate, adaptable and acceptable one;
- . an aid to improve coping with unexpected events or culture shock in a new culture;
- . a means of reducing the uncertainty of interactions with foreign nationals; and
- . a means of enhancing expatriates' coping ability by reducing stress and disorientation.

It can reduce or prevent failure in expatriate assignments (Giacolane and Beard, 1994). Furthermore, in a survey of 200 corporate clients, Berlitz International found that companies needed cultural orientation training programs more than foreign language training (Lubin, 1992).

Further benefits of receiving cross cultural training prior to relocation are that it:

- Prepares the individual/family mentally for the move,
- Removes some of the 'unknown',
- Increases self-awareness and cross cultural understanding,
- Provides the opportunity for questions / anxieties to be addressed in a supportive environment,
- Motivates and excites,
- Reduces stress and provides coping strategies,
- Eases the settling-in process,
- Reduces the chances of relocation failure.

<http://www.kwintessential.co.uk/cultural-services/articles/expat-cultural-training.html>.

A major objective of inter-cultural training is to help people cope with unexpected events in a new culture. Thus, an objective of training is to reduce conflict due to unexpected situations and actions (Harris & Moran, 1987:88-89).

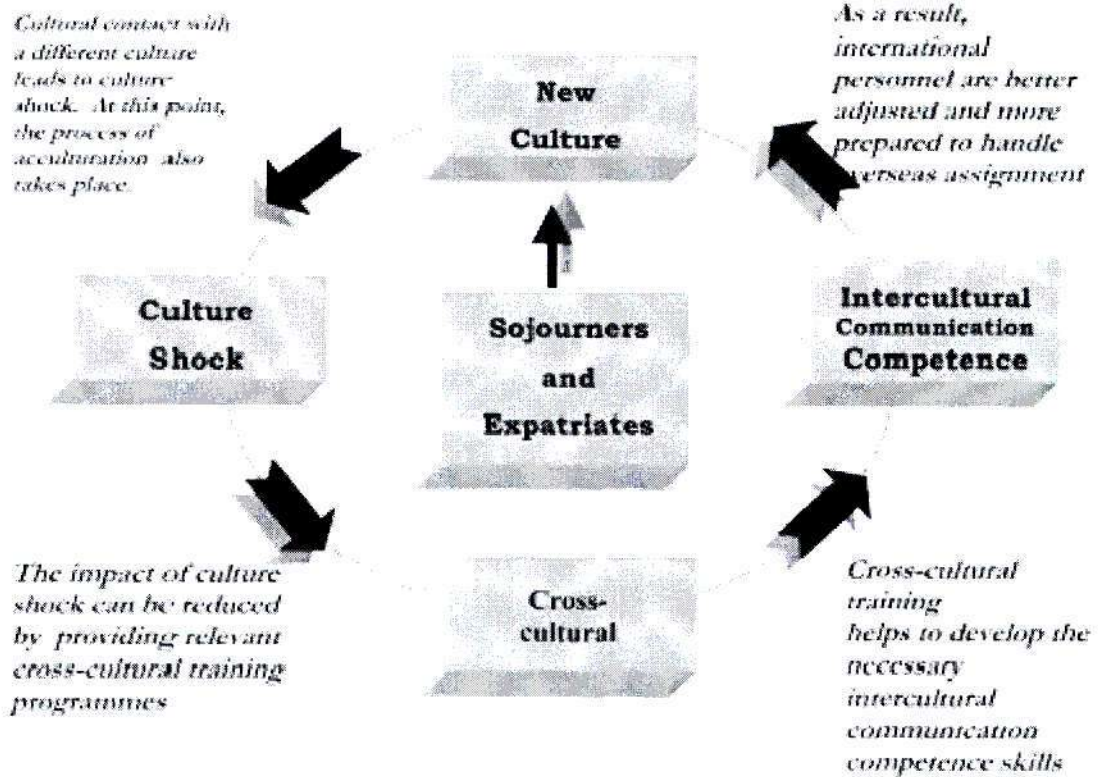
2.5 Cross-Cultural Training Models

Three models of cross-cultural training will be discussed in this section: the acculturation model, the training effectiveness model and the integrated cross-cultural training model. Before expanding on the various models of cross-cultural training it is imperative that we first have an understanding of the cross-cultural cycle.

The following model is based on the concept of “cultural change,” which represents a transition between one’s own culture and a new culture. Cultural change is part of a problem-solving process undergone by users (Havelock, 1963; Conner, 1993). Here, the users are identified as sojourners and expatriates who experience a new culture which is unfamiliar and strange. In the initial stage of confrontation with the new culture, the user experiences a culture shock. Then, full or partial acculturation takes place, depending on factors such as former experience, length of stay, cultural distance between home and new culture, training and language competency among other factors. The greater the user’s ability to acculturate, the less the impact of culture shock on them. The ability to acculturate and reduce the impact of the culture shock can be developed through an appropriate and effective cross-cultural training. Apart from that, training can also help the users develop inter-cultural communication competence, which is needed to adapt better and perform well in the new environment. As a result, once sojourners and expatriates have succeeded in completing the cycle, they will be more familiar with it the next time they confront a new culture. The change process will be improved and become less complicated. However, the success or failure of the users to adjust and perform depends on how they respond to the cycle (Zakaria, 2000).

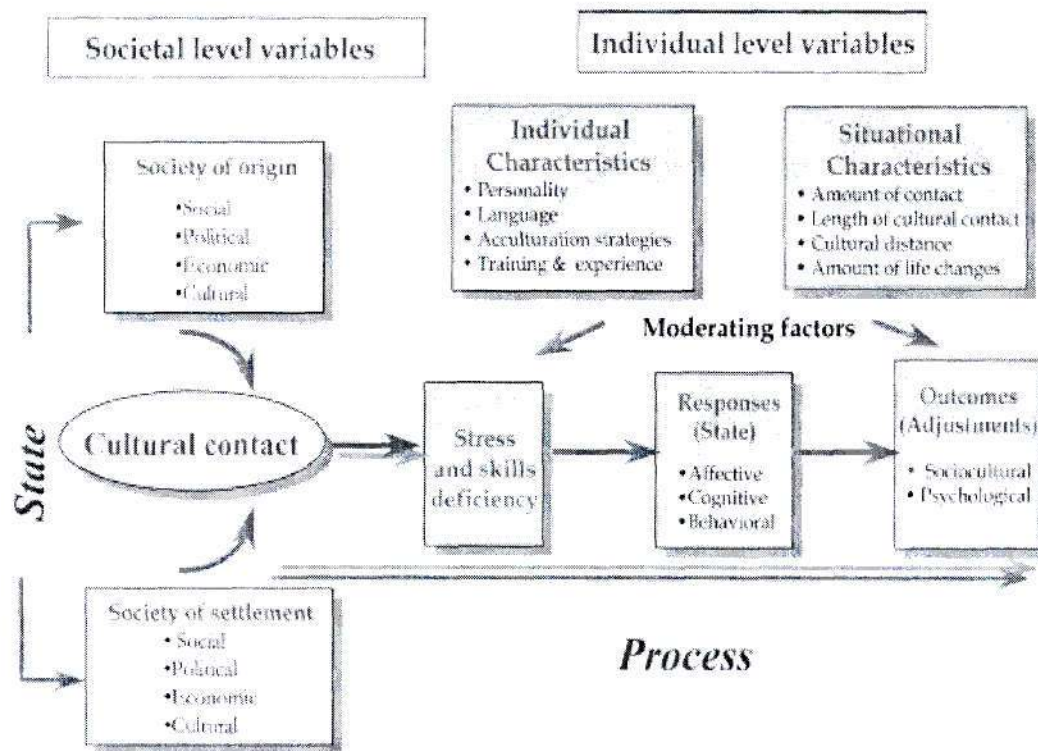
Initial entry

In this initial stage, international personnel travel to diverse cultures and come across a



Source: Adapted from Havelock (1963) and Conner (1993).

Figure 2.1. Model of Cross-cultural cycle



Source: Copied from Lazarus & Folkman (1984), Ward (1988), & Berry (1994).

Figure 2.2 Acculturation process model

2.5.1 The acculturation model

Acculturation is defined as, “Changes that occur as a result of first-hand contact between individuals of differing cultural origins” (Redfield et al, 1936). It is a process whereby an individual is socialized into an unfamiliar or new culture. In short, it refers to the level of adoption of the predominant culture by an outsider or minority group. According to Gordon, 1967; Garza and Gallegos, 1985; Domino and Acosta, 1987; Marin and Marin, 1990; Negy and Woods, 1992, the greater the acculturation, the more the language, customs, identity, attitudes and behaviours of the predominant culture are adopted. However, many sojourners and expatriates experience difficulty in acculturating; only adopting the values and behaviours they find appropriate and acceptable to their existing cultures. It is a question of willingness and readiness (Zakaria, 2000).

The acculturation process begins at the societal (macro) level, where cultural contact and cross-cultural communication take place between the society of origin and settlement.

The difference between the two societies is called the cultural distance. The societal variables for both societies consist of four main dimensions, which affect the acculturation process: social, political, economic, and cultural. The acculturation process is further influenced by the variables at the individual level, which may be divided according to two moderating factors; characteristics associated with:

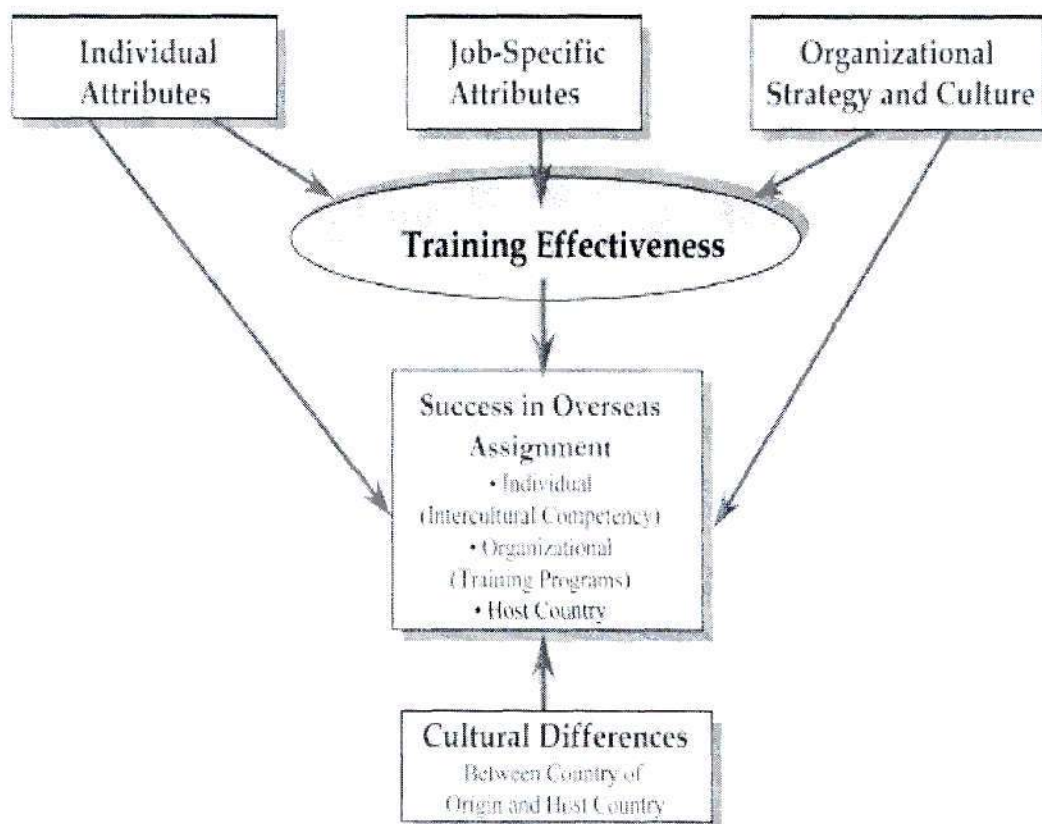
- (1) the acculturating individual (e.g. personality, previous training and experience, language competency, and acculturation strategies); and
- (2) the acculturation situation (e.g. amount and length of cultural contact, perception of cultural distance, and amount of life changes)(Zakaria, 2000).

This model considers culture contact as a major life event. It is characterized by elements such as stress, disorientation, and learning deficits; it demands cognitive appraisal of the situation, behavioral and affective responses for stress-management, and the acquisition of culture-specific skills. All the cultural contact factors, together with the psychological and socio-cultural outcomes, are influenced by both the societal and individual-level variables (Ward, 1988). Ward (1988) further points out that researchers may also conceptualize acculturation as relating to the acculturated individual state in which acculturation is defined and measured in relation to the three markers: cognitive, behavioral, and affective. However, she did not define these states further because her model is framed as an ongoing process.

The theory of acculturation represented in the first model (Figure 2) also addresses some essential issues that have been brought up by intercultural trainers. For example, Martin (1986) regrets the lack of conceptual clarity about what constitutes cross-cultural orientation and which outcomes should be considered. In response to this, the model offers a basic distinction between psychological and socio-cultural adjustments and suggests that adjustment outcomes can be integrated with training objectives. Further, this model also supports Martin's claim that both culture-general and culture-specific training are relevant to cross-cultural orientation programs. However, the model has some drawbacks. For example, although Ward includes macro-factors, such as politics, social, economics, and culture in both the society of settlement and society of origin, which

undoubtedly affect individual acculturation, the macro-factors are given less attention than the individual-level factors. The individual-level variables, but not the macro-factors, are shown to be moderating factors in the acculturation process. Furthermore, Ward concluded that situational factors were more relevant than the individual factors. This implies that, although both factors can moderate the process of acculturation, the degree of impact each factor has on the process is different. This may be true, but the implication can be confusing because, in the model, both variables were shown to be equal moderating factors. The model also suggests that adjustment outcomes can be integrated with training objectives. The model, however, does not explicitly show how a training program can play a critical role in ensuring successful acculturation outcomes.

2.5.2 The training effectiveness model



Source: Copied from Bhagat & Prien, 1992.

Figure 2.3 Training intercultural effectiveness model

This model developed by Bhagat and Prien (1996), called intercultural training effectiveness (Figure 2.3), was produced on the assumption that a precise assessment of the various needs associated with intercultural training needs could be conducted. Basically there are three main attributes which have an impact on both training effectiveness and individual success in overseas assignments, job-specific, and organizational strategy and culture. The individual attributes associated with overseas success include: cognitive flexibility, adaptability, tolerance for ambiguity, non-ethnocentrism, positive self-image, outgoingness, cultural sensitivity, intercultural competence, and extroversion. The job-level attributes include: level of technical skill, need for information about the host country and of the operations headquarters, and complexity of interpersonal and administrative activities. At the organizational-level, strategic and cultural factors have the highest relevance in designing effective training. They ensure that the training objectives are consistent with the design of the training program. In addition, cultural differences or "cultural distance" between the country of origin and the host country also impact on success in overseas assignments. Following training, the success of overseas assignees is conceptualized at three levels: intercultural competency, especially effectiveness in the work role; organizational success, reflected in the impact of the training programs; and training effectiveness from the point of view of the host country (Triandis, 1994).

In the training model (Figure 2.3), successful adjustment in overseas assignments is greatly affected by cultural differences between the country of origin and the host country. Again, this is similar to the acculturation model, which suggests that the culture of origin and the culture of settlement modify cultural contact and psychological and socio-cultural adjustment in a number of ways based on overall cultural similarities and differences. The unique significance of the training model lies in its focus on organizational attributes. These help to highlight such key questions: whether training is seen as a strategy to gain competitive advantage, and is incorporated into the "work-cultures" and whether the organization invests heavily in training and development (T&D). In essence, the training model succeeds because it explicitly explains what constitutes training effectiveness in the cross-cultural context and defines various

variables affecting it. However, the model also has some limitations. It assumes that learning is based on the acquisition of knowledge, rather than on changes of attitudes. In a cross-cultural setting, training requires not only recognition, but also acceptance of differences. This helps the expatriates to make the necessary changes in attitudes, which may be the most difficult part of training in a cross-cultural setting. In their review of cross-cultural training, Hesketh and Bochner (1994) addressed some of these shortcomings. They suggested that the training model of Bhagat and Prien (1996) should be modified and expanded, specifically in the context of cross-cultural settings. People should be taught how to learn by developing specific skills, which, in turn, can be used to adapt and transfer to the demands of changing jobs in a dynamic environment.

Lastly, they suggested that the focus of training should be on the trainee, and not on the trainer or the training method. On the contrary, Bhagat and Prien (1996) believed that overall effectiveness can be enhanced only with an explicit, articulated strategy, which is then incorporated into the design of training. Thus, some parameters for training design must be provided. This is because effective and appropriate training design can have beneficial consequences for the individuals, organization, and members of the host country coming into contact with expatriates. Nevertheless, they also feel that more research is needed on the links between training and organizational outcomes, especially in the commitment of firms towards training resources, in order to develop training in more meaningful programs for expatriates.

While the acculturation and training models are based on two different concepts: the acculturation process and the effectiveness of training, the factors affecting the success of the two models are similar. For example, the individual factors predicting success in the training model in overseas assignments involve similar competencies as the individual characteristics moderating successful adjustments in the acculturation model.

2.5.3 An integrated cross-cultural training model

The two previous sections presented two models of acculturation and training effectiveness. However, both models have certain limitations. Consequently, both models are combined to create a third model, the "Integrated Cross-Cultural Training Model," which links the effectiveness of training programs to the process of acculturation (Figure 4). Cross-cultural training can help expatriates adjust more successfully and decrease distressing experiences during the confrontation of uncertainty in foreign cultures. This model defines acculturation as both a process and a state.

This suggested model maintains the same societal-level variables that were examined in the acculturation model (Figure 2.2), with slight but important modifications in the individual-level variables. In the original model training and experience was one of the individual-level characteristics. However, in this model, training is explicitly shown as a sub-process to stress the importance of providing training prior to cultural contact and before the acculturation process. Some individual and situational characteristics have also been added to the individual level of variables by integrating relevant attributes from the training effectiveness model (Figure 3). For individuals, these added characteristics are family support and willingness to acculturate. The new situational characteristics are type and length of assignment and training. The major enhancement in the integrated model is the addition of another critical process before cultural contact takes place, both of which are antecedents to the acculturation process. This new process is called the moderating process and it requires effective training programs.

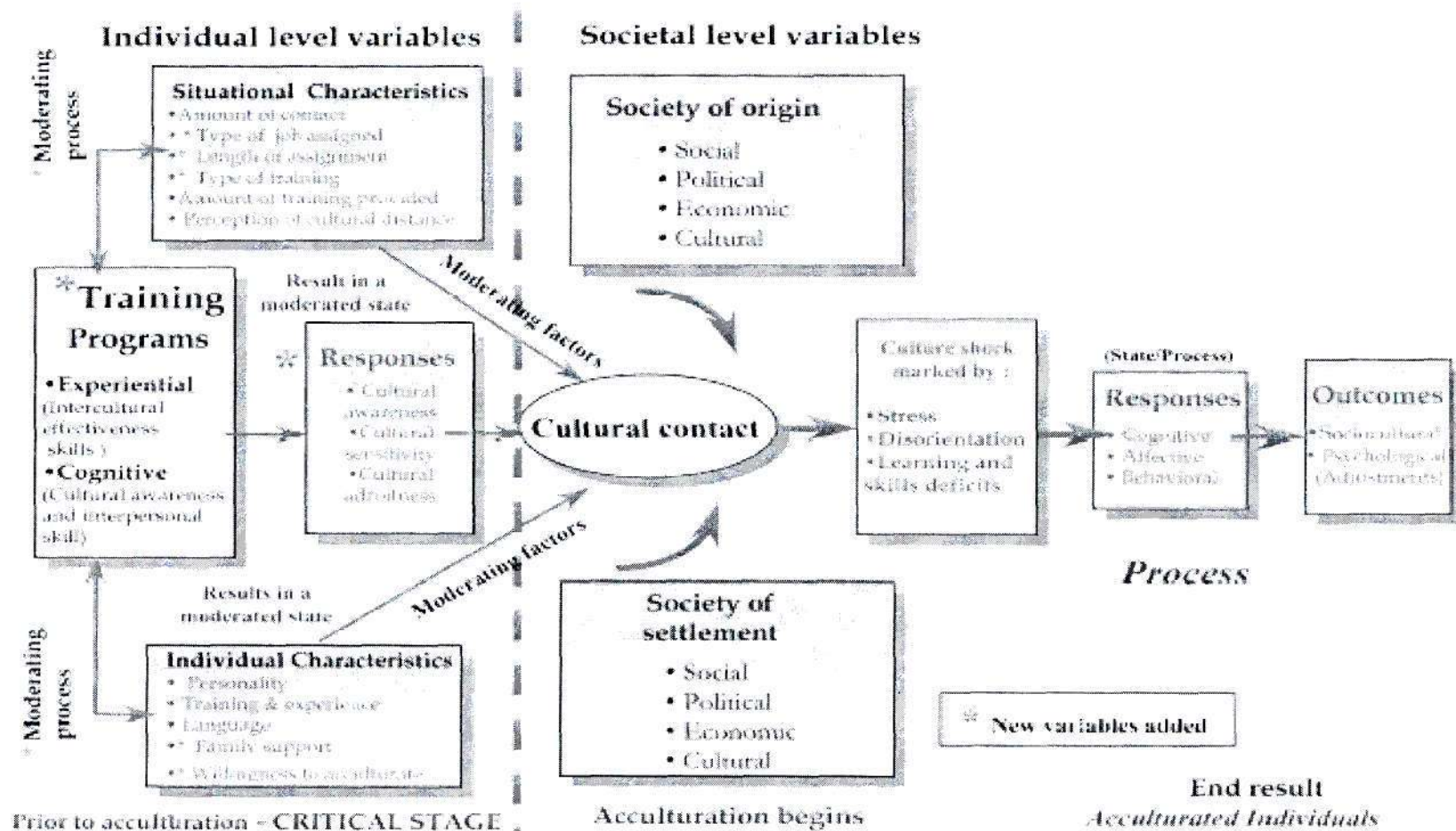
The objectives of the moderating process are: to modify the individual and situational characteristics; to reduce such factors of culture shock as stress, disorientation, and learning and skills deficiency; and to achieve better acculturation outcomes than by the unmoderated process alone. Training is the critical component.

Global experts recommended that when the need to send people abroad arises, overseas personnel and their families must be given adequate preparation ahead of time for their new cultural experiences (Laabs, 1993). The training will help to bring about a

continuous learning process to help them to adapt better. In fact, it is critical for them to get adequate preparation, both socio-culturally and psychologically, if they are to acculturate successfully. There are many training programs available today, but two programs best enhance situational and individual characteristics: experiential and cognitive training. Both types of training add new characteristics to the situational variables since the types and durations of training programs have different effects. Length of assignment is used to classify a person as an expatriate or visitor, since they need different types of training programs. As illustrated in the training model (Figure 3), the particular job attributes also give rise to the particular training needs. Therefore, before designing training, all these factors must be carefully examined. If an organization provides inappropriate training programs to its expatriates, these individual and situational characteristics will negatively affect cultural contact factors and acculturation outcomes.

Looking next at individual characteristics, it is important to provide training for both the individual and family. It is not effective to prepare only the affected individual for an overseas assignment since family support has a paramount impact on the success of adaptation.

The acculturation model (Figure 2) presented failed to include this element in the acculturation process, whereas according to Tung (1988), one of the most frequent reasons for failure relates to the inability of the family to adapt to life in the host country. Over 80 percent of the firms surveyed found that training is only given to the employees and not to the spouse and family (Arvey et al., 1990). As a result, many employees return prematurely because of the spouse's failure to adjust to a dissimilar culture (Briody and Chrisman, 1991; Solomon, 1994; Tung, 1987). Both individuals and their families have to adapt. Hence, for successful acculturation, they need to go through a training process first.



Source: Adapted from Lazarus & Folkman (1984), Ward (1988), Berry (1994), Bhagat & Prien (1992).

Figure 2.4. Integrated cross-cultural training model

In addition, another new individual characteristic is willingness to acculturate. Sometimes expatriates refuse to fully acculturate because of the many difficulties they face. Instead, they become bicultural, adopting only those cultural traits or values they think are relevant to their work performance. By providing appropriate and effective training programs before cultural contact, sojourners and expatriates can develop greater intercultural communication competence and thus enhance the ability to acculturate. Once both the situational and individual characteristics are modified and enhanced by appropriate training programs, individuals develop intercultural competence and are prepared to confront the new culture. Borrowing from Chen and Starosta (1996), intercultural competency is a three-part process that leads to cultural awareness, cultural sensitivity, and cultural adroitness.

Cultural awareness

This cognitive process consists of two main attributes, self-awareness and cultural awareness. These attributes provide the framework for communication competence in a diverse society. Once people become more self-aware, they tend to be better at predicting the effects of their behavior on others. After they learn something about another culture and begin to understand the cultural "map" they know how to modify their behavior to meet the expectations of the new society.

Cultural sensitivity

A sojourner must be able to incorporate values, such as open-mindedness, high self-concept, non-judgmental attitudes, and social relaxation, in order to understand the value of different cultures and become sensitive to the verbal and non-verbal cues of people from the foreign culture.

Cultural adroitness

With respect to inter-cultural communication competence, people learn how to act effectively when in contact with the new cultural environment. When they know what to do and what not to do, they will be able to communicate effectively without offending any parties.

In this model, three types of inter-cultural competence have been explicitly incorporated as important processes for acculturation, as emphasized by Chen and Starosta (1996). These competencies are seen in another form as responses to culture shock. Training programs, which create better states after individuals are in contact with the culture, can moderate the responses of sojourners and expatriates. After the moderating process, the individual responses may be different because of intervening factors such as the situational and individual characteristics. Different training programs promote various aspects of competence. For example, while cognitive training should enhance a person's cognitive level (i.e. cultural awareness and interpersonal skills), experiential training should enhance a person's affective and behavioral levels (i.e. their intercultural effectiveness skills).

However it is also important to understand that although training is directly related to competence, the moderating factors, which consist of both the situational and individual characteristics, also impact and give rise to variations in the responses. Training moderates the initial state prior to cultural contact thereby optimising the state of cross-cultural competence. Looking at acculturation from a state viewpoint can explain a wider range of outcomes in the Integrated Cross-Cultural Training Model. On the other hand, training can also make the acculturation process easier and less stressful by developing both culture-general and specific factors as both training state and process have a positive relationship to the outcome. Thus, effective process of acculturation may achieve an effective state of response.

The importance of the suggested integrated model has been clearly addressed through the description of the effects training can have on acculturation. The next step is to discuss how the model affects the contrasting skills developed by experiential and cognitive training affect responses and outcomes. Experiential training is expected to enhance personal and family adjustments, as well as work performance overseas because it tends to concentrate on individual characteristics rather than situational ones. Therefore, an experiential training program should aim to develop intercultural effectiveness skills,

especially the three basic skills of adaptation, cross-cultural communication, and partnership. Furthermore, it should include other skills, such as work transition, stress-management, relationship building, and negotiation techniques. By going through an experiential program, individuals and family members become more sensitive and able to respect the differences between their culture of origin and the contact culture. In addition, they learn skills that will enable them to choose the "right" combination of verbal and non-verbal behaviors to achieve a smooth and harmonious relationship with their hosts in the foreign culture. These skills enhance both their affective and behavioral responses, which in turn, trigger more successful psychological adjustments. Ward and Kennedy (1993) support this interpretation in their finding that locus of control, life changes, social difficulty, and social support variables are predictors of psychological adjustment.

By contrast, cultural awareness training is a cognitive method that aims to enhance interpersonal skills. Such training focuses on understanding the host culture in a more personally relevant way to develop performance-enhancing interactive skills. The best known technique for creating such cultural awareness is through the self-learning tool called the "cultural assimilator" which stimulates and enhances sojourners' and expatriates' cognitive responses. As a result of cognitive training, people understand host social systems and values better (Deshpande and Viswesvaran, 1992). These cognitive responses then lead to better socio-cultural adjustments because they increase the level of satisfaction with the host national contact; reduce cultural distance; and help expatriates develop a more positive attitude towards the host culture. Ward and Kennedy (1993) also support this as they found that factors associated with intercultural awareness account for 52 percent of the variance in socio-cultural adjustments.

The Integrated Cross-Cultural Training Model is an improved model of acculturation; the explicit effects of training have been shown prior to cultural contact and the acculturation process. By looking at the effects of training theoretically, the model successfully explains how different types of training can promote different competencies (both culture and culture-specific skills) and trigger different responses, which consequently result in different adjustment outcomes. The three models (acculturation, training, and integrated

cross-cultural training) share many common traits or factors. Each model attempts to describe a process, which reflects the personal development of expatriates who interact with foreign nationals within a specific environment (the foreign culture) by developing culture-specific and general skills through training. The first two models differ in terms of their emphasis, goals, and content; the third model attempts to reconcile these differences.

While numerous studies have responded to the issues raised in this paper in the affirmative, there are also some contradictory responses. According to Black and Mendenhall (1990), many people are not convinced that training can do much to resolve expatriates' working problems, even when they are fully aware of them. For instance, companies such as IBM, require as many as forty two hours of management training on topics such as managing multinational groups of people and internationalization. However, surprisingly, many studies concluded that expatriate employees in this kind of company still face cross cultural obstacles and high failure rates in spite of the training efforts. Overall, the number of expatriate failures has been variously estimated at between 16 percent to 40 percent by Dowling and Schuler, (1990), 20 percent to 50 percent by Bird and Dunbar (1991), and approximately 30 percent by Tung (1987). Although many scholars agree that training is the best approach or tool for developing inter-cultural competence, not everyone sees it as the principal solution to cultural problems (Kealey and Protheroe, 1996). Other people question the effectiveness of cross-cultural training more explicitly. Since prolonged international business travel is increasingly important in today's global market, the need to develop successful training programs is also critical. Many first-time expatriates face cross-cultural adaptation problems stemming from the ignorance both of "self-culture" and "cross-culture" and from their tendency to depend on their previous set of ethnocentric beliefs (Smith, 1998).

2.6 Design of cross-cultural training

The issues or focus points are very important in cross-cultural training as it is required to choose between culture specific or culture general training, which areas of the culture to focus upon and what are the personal requirements of the person who might have to deal with a situation like this or who is shifting to a different culture for work. The study by Hun and Jenkins (1998) mentions the following issues for the cross-cultural training:

- Different aspects of time like punctuality- The time factor here involves two dimensions that are punctuality and relationship. While in some cultures like USA, starting and ending on time are very important, in others, like South American countries that may be considered exceptional. Some cultures prefer to take time for relationship building, which may not be acceptable at all in others. Hence cross-cultural barriers related to time need to be taken care of.
- Linguistic barriers- English is being used for most transactions but then usage of English tends to change with the country contexts. For example the pronunciation in India is significantly different from the American way. Secondly certain terms may have different meaning in different languages; hence context also plays an important role. In the case of countries with different languages, the expatriates must be trained in opening dialogues and discussions with the help of translators.
- Different business practices, like conduct in meetings with unstructured and open discussion. Hofstede's (2001) dimensions like power distance can play an important role in situations like conduct during the meetings. In cultures with lower power distance the employees may tend to call their bosses by their first names while this may be impossible in cultures with higher power distances. Hence developing a first hand knowledge about the practices is very important.
- Cultural stress (ambiguity and difference of perceptions) - The training should also involve methods to counter stress and to interpret situations. The expatriates will have to understand the situations on their own and then form perceptions. The training should avoid any kind of stereotyping where trainees may be lead to believe certain things about any culture. The culture may broadly explain value system of a community or country but every individual is different. Hence any

individual with a pre-formed notion about the culture will be shocked to see people different from his beliefs leading to lot of confusion and stress.

- Body language and greetings- The way emotions are expressed in various cultures may differ, for example facial expressions and hand gestures may convey different meanings in different culture.

The cross-cultural training should have components related to both general orientation and specific skill development (Harrison, 1994). The component of general orientation here consists of self assessment (dealing with change, stress management and identifying attributes) and cultural awareness (general dimensions, national values and work place incidents). The specific development on the other hand consists of knowledge acquisition (area studies, language studies and host attitudes) and skills training (case studies, area simulation and behavior modeling). Hence the training should focus on providing each trainee the knowledge about national cultures and attitudes in the host country in the first phase while in second phase the trainee should be made to go through a rigorous process of handling the situations in a simulated environment. This will help the trainee to acquire hands-on experience.

After the internet revolution things have vastly changed for various organizations. For example many firms use internet as a medium to coordinate between different employees working in different locations as a team. One of the team members would be in India, other one might be in Europe and third one in North America. The group dynamics in these situations becomes very important; hence the employees must also be trained at handling people from diverse cultures at the same time ensuring equal treatment and opportunities for all. One of the most important factors that is often forgotten while designing the training programs is the requirement of the employees, the design of training program should be made keeping in mind the length of stay in the host country, type of function he will have to perform, degree of socialization required by the employee and the personal characteristics of the employees (extraversion, interpersonal skills etc.). Hence cross-cultural training program should be customized for each employee to a certain extent. It's not only the employee who needs to be trained; the

family of employee should also be trained on certain issues like cultural differences. Many firms have started giving due importance to the training of spouse because the socialization of expatriate and job success to a large extent will depend upon socialization of his family.

2.6.1 The training methods

Cross-cultural training evolved with usage of the lecture method (originated from university of Illinois- as referred by Bhawuk and Brislin, 2000). This was followed by usage of contrast American method which was so named due to its uses of contrasting cultural experiences as a training method. The scenarios and cultural assimilators were later additions to these methods. The self reference criterion method was developed from the cultural analysis system developed in 1966. The first usage of the cultural assimilators was on the American soldiers in 1972. The existence of cultural general assimilator is relatively new with usage starting in 1986. The experiential and area simulation were developed in the 70's.

The various cross-cultural training methods can be explained as follows (as described by Bhawuk and Brislin, 2000):

- Cultural assimilator: The cultural assimilator is a tool that consists of a number of real life scenarios describing puzzling cross-cultural interactions and expectations. The scenarios here can be defined as critical incidents which describe interactions between host and expatriates which involve misunderstanding related to cultural differences.
- Contrast American method: This method involves demonstration of behaviors that are completely opposed to what is seen in the current context of culture. This was used by Stewart in America to train people going abroad hence was named contrast American.
- Self reference criterion (SRC): Unconscious reference to one's own cultural values in communication with people who are from other cultures. This method was developed by Lee (1966), who proposed a 4 step procedure to overcome self reference criteria. The first step involves defining any problem or situation in

terms of the expatriate's own culture, followed by definition in the terms of host culture. The bias created by SRC is analyzed and removed in the third stage which is followed by a solution of the simplified business problem.

- Area simulation: Area simulation is creating natural situation of interaction with people from other cultures. This can be achieved using some actors who will interact with the trainee according to some predefined script.
- Cultural self awareness model: The cultural self awareness model includes usage of video tapes with themes and role plays. If the trainee is able to understand how his culture is different he would be able to accept the differences encountered in real life interactions in a better manner.

The study by Caligiuri et. al.,2001 referring to the study by Brislin et al(1983) outlined the frequently used cross-cultural training methodologies during the early 90's: "(1) fact-oriented training; (2) attribution training, associated with the culture assimilator to enable trainees to internalize values and standards of the host culture; (3) cultural awareness training, the study of the trainee's home culture and its effect on his/her behavior to enable the trainee to understand the nature of cultural differences; (4) cognitive-behavior modification, to assist trainees to be able to obtain rewards and avoid punishment in the host culture; (5) experiential learning, active participation learning about a specific host culture; and (6) interaction learning, for trainees to feel more comfortable with host nationals and to learn details about life in the host country. Language training aids in communications demonstrate an attitude of attempting to learn about the host culture enables one to be polite and permits understanding".

2.7 Conclusion

It is imperative that employees who are to be expatriated are well informed regarding the challenges they might face in a foreign land. Coping with a foreign culture, both organizationally and nationally, needs well-planned preparation. A well structured cross-cultural training will help the employees to prepare for coping with the changes in the working styles, beliefs and values they are expected to face. A large degree of uncertainty

which an employee might face while moving to a foreign land and culture can be reduced through organizational support in terms of training. The huge costs that an organisation might face due to expatriate failure is of high concern. Preparing the employees for a

which an employee might face while moving to a foreign land and culture can be reduced through organizational support in terms of training. The huge costs that an organisation might face due to expatriate failure is of high concern. Preparing the employees for a foreign assignment is mutually beneficial to the organization and the employee. For the employees, a well delivered training program can help in managing with the new situations, while for the organization this helps in getting the best of the employee in terms of work output through maintaining employee morale and motivation.

CHAPTER 3: RESEARCH FRAMEWORK

3.1 Introduction

How Cross-Cultural Training (CCT) approaches and methods are fitted into the company's expatriation program is an important Human Resource Management decision. It begins with conducting a thorough job analysis to reveal the essential requirements of the job, what the ideal expatriate candidate should be, and what training he/she is likely to need. Furthermore, to ensure success in the development of the second economy at the national level, and progress of the globalisation process at the corporate level, it is imperative to select, prepare and retain the most suitable candidates for expatriation.

3.2 Literature Review on the Selection of CCT Methods

Every employee assigned overseas is in need of certain CCT which can be seen to be both universal and unique in its own way. The point is to establish as close a match between the training need and the training method. Generally speaking, the greater the training need, be it due to the unpreparedness of the trainee or the nature of the new culture and assignment, the more rigorous the CCT ought to be. As such, judicious selection of training methods is crucial in ensuring adequate preparation for the expatriates. Three frameworks, each an improvement over the preceding one, are reviewed.

3.2.1 Tung's Contingency Framework

Tung (1981) proposes a contingency framework for the selection of CCT methods. Her reasoning is that in view of the fact that (1)culture varies from place to place, (2)overseas assignment differs from time to time, and (3)the personal characteristics of the trainees are unique, it is not possible to attach generically constant weights to each of the three

factors mentioned. Hence, she bases the selection of the CCT methods, specifically the level of training rigor, on the interplay of three considerations:

- job analysis, in terms of the extent of interaction with the local community;
- target country, in terms of the degree of cultural similarity between the home country and the host country;
- personal characteristics, in terms of the trainee and his spouse's ability to function in a foreign cultural setting.

Where the extent of interaction with the local community is high, the degree of cultural similarity is low, and the trainee as well as his spouse's ability to work and live normally in a foreign environment is uncertain, CCT methods of the highest rigor need to be administered to focus on building cultural awareness, sensitivity and problem-solving skills.

Where the opposite is true, the training can be more focused on enhancing task competence. It must, however, be noted that emphasizing on honing task competence does not amount to neglecting the development of culture learning and cross cultural problem-solving skills. Neither does focusing on cross cultural competence mean a compromise on task competence. It is a matter of paying more attention to the areas that warrant it.

Tung's framework has been essential in sparking off further developments on the issue of selecting the right CCT methods or combinations of methods as appropriate preparation for fruitful performance across cultures. As a very general framework, it does not define "rigor". This is a limitation because human resource decision makers have to rely a great deal on their judgement to first define "rigor" for themselves and then determine the specific CCT methods to employ (Black and Mendenhall, 1991).

3.2.2 Mendenhall and Oddou's Framework

Mendenhall and Oddou (1986) enrich Tung's contingency framework by presenting one which groups the CCT methods into high, medium and low levels of rigor and suggests the desired duration of CCT.

According to Mendenhall and Oddou's (1986) paradigm, where the duration of sojourn in the host culture is long (1-3 years), the degree of interaction and integration with the foreign culture is deemed to be high. This necessitates a high level of training rigor. The corresponding training approach, the 'impression approach', employs methods like assessment centres, field experiences, simulations, sensitivity training and extensive language training. Information giving training methods like area and cultural briefings, affective training like role-playing is also included to provide the comprehensiveness the nature of the overseas assignment warrants. Hence, the length of training has to be long (1-2 months).

This framework has been criticised for not explaining how the level of rigor of a specific CCT method is determined (Black & Mendenhall, 1991). One can also caution that there is no simple one-to-one correlation between the duration of sojourn and the required degree of interaction and integration with the host culture. Whereas a three-day trip to the Philippines for the purpose of conducting a branch audit necessitates minimal cultural integration, an assignment of the same duration to the Philippines for discussing and concluding the finer details of a joint venture warrants full cross-cultural readiness and competence.

3.2.3 Black and Mendenhall's Framework

In an attempt to improve on Tung's (1981) and Mendenhall and Oddou's (1986) frameworks, Black and Mendenhall (1989) proposes a CCT methods selection framework based on the social learning theory (SLT) (Bandura, 1977).

The social learning theory (Bandura, 1977) states that learning can take place in two ways: first, by positive reinforcement and secondly, by duplicating the learned behaviour acquired symbolically or by associating the behaviours with the outcomes. The four core elements of the theory are attention, retention, reproduction and incentives.

The trainees are more likely to pay more attention if the training model used is popular and easily available. If the training approach is the type that the trainees are used to, attention level will also be higher. In addition, where reward is expected, attention level can reach new heights. Retention is measured by the extent the trainees commit the principles, skills and insight acquired to memory. This can be reinforced by frequently modelling and rehearsing the desired behaviours.

Reproduction refers to translating the learned and retained behaviours into practice. The extent to which this is done is greatly influenced by two factors: (1) the motivational effects of incentives, specifically, how far the trainees believe that displaying the desired behaviours will lead to the desired outcomes; (2) to what extent the trainees believe they can perform the desired behaviours.

The SLT attempts to capture the essence of several important theories. It integrates the cognitive and behavioural theories. It explains the notion of motivation within the concept of self-efficacy as well. The issue of how the trainee acquires and displays the desired behaviours taught to him is also addressed. However, it is noted that “the importance of certain variables of SLT is different in cross-cultural training situations (Black and Mendenhall, 1990). Also, attention, retention and reproduction can be slowed down by situational factors such as high culture novelty, high degree of cultural interaction and integration, high job novelty (Black and Mendenhall 1991), and the trainees’ personal and familial characteristics (Tung 1981).

The SLT defines rigor as the degree of cognitive involvement required. The relative degree of rigor of specific CCT methods can also be captured in the symbolic modelling process and the participative modelling process within the SLT (Black and Mendenhall 1991).

Symbolic processing can be divided into two forms. The first form refers to hearing about the behaviours and translating them into images in the mind. Observation and rehearsal of the behaviours then take place in the mind. CCT methods that utilise this form of modelling process include verbal factual briefings, lectures and books. The other form differs in that the trainees actually see the modelled behaviour before committing it into images. This form of modelling process requires greater cognitive involvement and therefore the CCT methods that utilise this process, for example films, role modelling and demonstrations, are more rigorous than the CCT methods that appeal only to the sense of hearing. The effects of symbolic modelling can be enhanced by utilising cognitive (or mental) rehearsal of the training content, which Black and Mendenhall (1991) classify as factual in nature.

Participative modelling requires greater cognitive involvement than symbolic modelling because apart from observing, the trainees also partake in modelling the behaviour. This participation comes in two forms: “verbal” participation and “physical” participation. “Verbal” participation refers to having the trainees verbalise their responses during training sessions which are analytical in nature, such as case studies and culture assimilators. “Physical” participation refers to providing actual physical response during training sessions that are experiential in nature, such as role plays, interactive language training, field trips and interactive simulations. Physical participation is more cognitively engaging than verbal participation. The training rigor of physical participation is correspondingly higher too. The effects of participative modelling can be reinforced by cognitive as well as behavioural (or physical) rehearsal.

Black and Mendenhall (1989) propose that the relative rigor of a specific CCT method can be approximated by examining the modelling and rehearsal processes involved, as well as the duration and frequency of a training program. The longer the training, and the more frequently it is held, the more rigorous it is.

The SLT literature and the CCT literature lend evidence that increasing the rigor of the training amounts to increasing the trainees’ effectiveness in producing the desired cross-cultural behaviours (Bandura, 1977; Tung, 1981; Black and Mendenhall, 1990). Black

and Mendenhall (1989) explain that this is because rigor, expressed in the form of cognitive involvement, raises the level of attention and retention, hence improving reproduction proficiency.

3.3 Important Situational Factors

Like Tung (1981) and Mendenhall and Oddou (1986), Black and Mendenhall (1991) identify culture novelty, degree of cross-cultural interaction and job novelty as important factors influencing the choice of CCT methods. Yet they move one step ahead by analysing the components of each factor.

Net Culture Novelty = Objective Culture Novelty - (the Quality + Quantity of an Individual's Previous Experience)

Hofstede (1980) offers a method to estimate the culture novelty of a foreign culture relative to the American culture. He makes use of four scales: power distance, uncertainty avoidance, individualism, and masculinity. The absolute difference in scores on each of the four scales between the employees of the target country and the American employees are determined and summed. A large number indicates high culture novelty. Culture novelty can also be estimated by assessing whether there is any difference in the functional languages used in the home and the host countries, and whether there is any need to learn the languages to facilitate cross-cultural success (Black and Mendenhall 1991).

The "quantity" of an individual's previous experience involve not only all his past experience with the host culture, but also all his previous interactions with a culture similar to the host's. The "quality" of the individual's previous experience refers to the intensity of his cultural interaction with the host culture or a similar culture. Intensity is measured by the frequency and degree of involvement of the interaction.

Degree of Interaction = (Frequency of Interaction with Local Nationals) x (Importance of Interactions) x (Nature of Interactions)

The more frequent the trainee is expected to interact with the local nationals, the higher the intensity of interaction. 'Where the interactions are numerous and significant, interaction intensity is high. The nature of the interactions plays a part in determining its intensity too. In this connection, the literature on communication has supplied reasons to believe that novel, two-way, unique, face-to-face, long-term, and informal cross-cultural interactions would be more trying than the opposite (Jablin, Putnam, Roberts, Porter, 1987).

Job novelty, the third important situational factor, is task-related. The more novel the new assignment is, the greater the assistance needed to help produce effective behaviour. This means that more rigorous training is required. Stewart (1982) suggests that to estimate the degree of job novelty relative to a specific trainee, three job characteristics should be considered: (1) extent of similarity in job demands between previous jobs and the new; (2) extent of similarity in job constraints between previous jobs and the new; (3) extent of similarity in job autonomy and authority between previous jobs and the new.

In view of the fact that maladjusted spouses and children can directly influence the expatriates' success or failure in the host country, the novelty of the foreign culture and the degree of expected interaction with the culture ought to be assessed in much the same way as is done for the expatriates (Black and Stephens, 1989).

Black and Mendenhall (1991) integrate the notions of culture novelty, interaction, job novelty and CCT rigor by reasoning that high culture novelty, interaction and job novelty make the process of attention, retention and reproduction slower. It is necessary to add rigor to the training programs because it can capture attention better, deepen retention and facilitate reproduction proficiency. Correspondingly rigorous CCT methods are therefore selected. To add, it has been shown that job novelty is relatively easier to adjust to than culture novelty and a high degree of interaction with the host culture (Black and

Stephens, 1989). Since it is possible to quantify the respective dimensions, CCT programs can be customised for each trainee.

This means that a trainee who faces a highly novel job will receive relatively more training that will increase his technical competence. Likewise, where the degree of interaction is high, learning in this area needs to be enhanced by emphasizing on training topics such as interpersonal skills and perception. Where the degree of culture novelty is high, topics such as country studies need emphasis. Thus, the trainee receives more assistance to more effectively acquire and emit the kind of behaviour that will contribute to impressive cross-cultural performance (Black and Mendenhall, 1991).

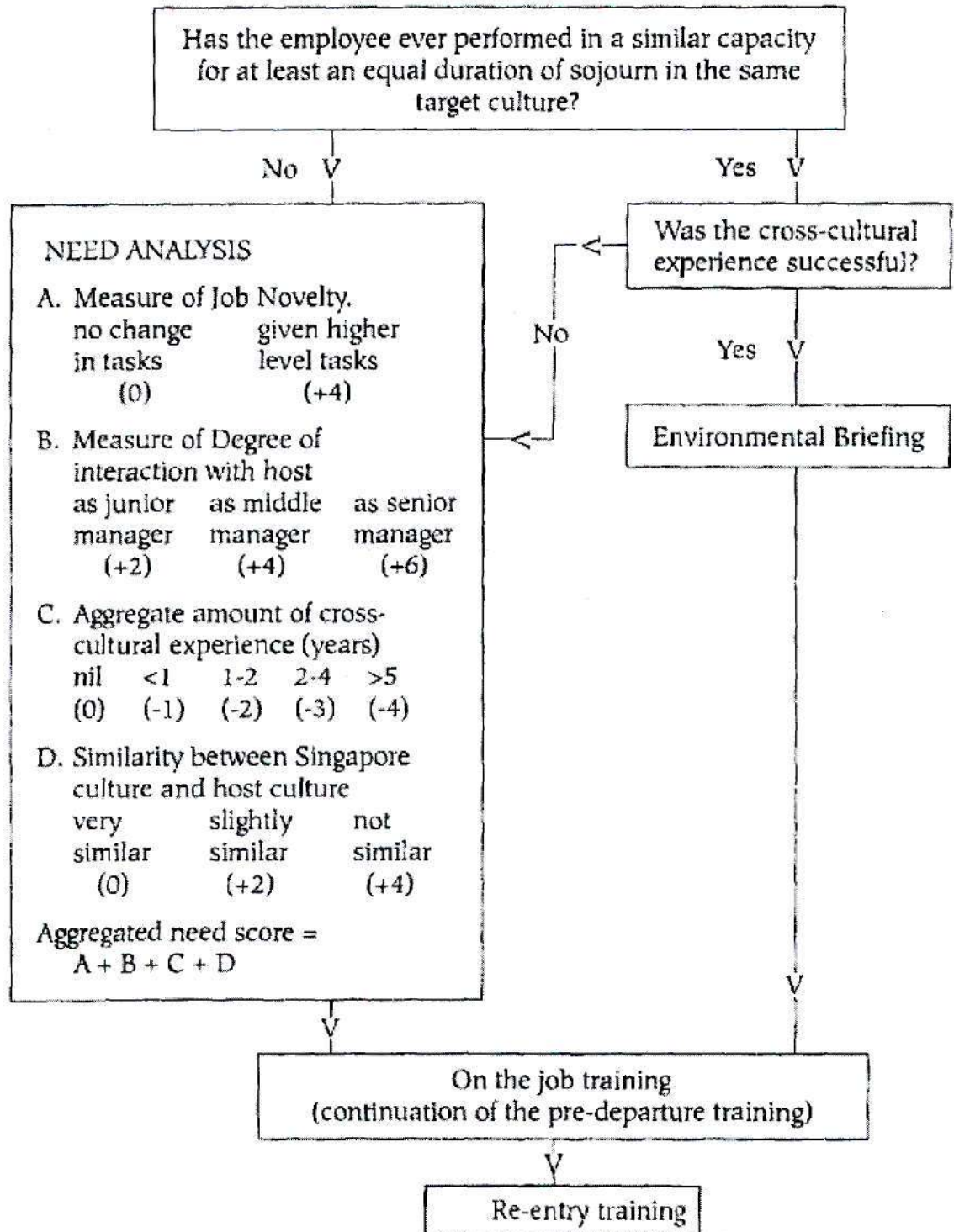
Black and Mendenhall (1991) do not distinguish between cognitive and affective engagement. However, it is noted that affectively engaging training methods (for example, sensitivity training) are surely more rigorous than the cognitively engaging ones (for example, area studies). In comparison with cognitive, information-gathering programs, affective and immersion-oriented programs require more personal involvement of participants, especially when the need for degree of integration with the host-culture increases (Brislin, 1979; Mendenhall, Dunbar, & Oddou, 1987).

In sum, the bulk of the review is focused on the work of Black and Mendenhall (1991), the reason being their work is the most refined to date, backed by the social learning theory. The common idea shared by all the three frameworks reviewed is that there must be a fit between the CCT needs of the trainees and the rigor of the CCT program adopted, at all phases of CCT.

3.4 A Proposed Training Model

Figure 3.1 tries to identify those managers who need little more than an updated environmental briefing. They have had successful overseas sojourns. It is therefore a waste of time and resources to train them on something that they are already proficient in.

Figure 3.1
Determining Cross-cultural training need



Source: Copied from Young-Chul & Chun (1995)

Fresh expatriates deserve CCT. We shall sequentially go through the flowchart in Figure 1 to determine the extent of their CCT need.

First, we measure how novel is the fresh expatriate's new job relative to his past assignments. Where there is no change in task, job novelty is taken as nil. No additional CCT is required. This explains the case in which a junior-level manager assumes a new assignment in the same capacity. If the expatriate is assigned tasks that are of a higher level than his previous assignments, we add 4 points to reflect his degree of CCT need. This accounts for the case in which, for instance, a mid-level manager is promoted to assume the responsibilities of a chief executive in an overseas unit. These scores are without a unit of measurement, which is dispensed with since it is sufficient to use the numerical value of the scores (1, 2, 3...) to reflect the intensity of CCT need. (To facilitate computation, all decimal numbers will be rounded downwards.).

Next, we measure the degree of interaction expected between the expatriate and the target culture. As explained earlier, the higher the level of responsibility, the higher the degree of interaction. Hence the senior manager has a greater need for CCT than the midlevel manager, who in turn has a greater need for CCT than the junior-level manager. The relative scores reflect this difference. Note that the minimum score is 2, because the degree of interaction for all managers is high, although some interactions are more significant and frequent, hence more intense, than the rest. The bottom-line here is that every manager who makes cultural contact with people in the target country has a need for CCT. In addition, from this point onwards, repeat expatriates who have not been successful in their previous cross-cultural experience in the target culture will have to measure their degree of CCT need alongside the fresh expatriates.

The next determinant of CCT need to be measured is the culture novelty of the target culture relative to the expatriates' home culture. There are 2 elements to measure: the expatriates' past cross-cultural experience and the similarity between the home culture and the host culture. If an expatriate has more than 5 years of cross-cultural experience, he is regarded to be a seasoned international manager. He has less need for CCT because

he is likely to have learnt enough concepts and have encountered certain cross-cultural problems repeatedly.

Where the home culture and the host culture are not similar at all, there is a great deal of cross-cultural adjustment to make and more interactional skills to master. The CCT need is therefore higher. To account for this, we add 4 points to the expatriate's subtotal of CCT points. If the host culture is very similar to the home culture, cross-cultural adjustment and learning becomes almost negligible. Hence the corresponding score is zero.

On-the-job CCT should be provided regardless of whether the manager requires intensive pre-departure training or not. Empathising with the living conditions of the host country is never the same as actually immersing into the host culture over an extended period of time. Constant training, support and reinforcement are required to ensure that the expatriate sustains the desired behaviour he has acquired. CCT is essential at two levels. At the personal level, training helps combat loneliness and the fear of being ostracised in the foreign land. At the professional level, CCT helps the expatriate reconcile the potential conflict between doing business in the host country and obeying head office's directives. It is important to localise the training and let it be run by native trainers from the host country (Odenwald, 1993).

Not to be neglected is re-entry training, which is crucial in retaining the repatriates so as to tap into their cross-cultural expertise and experience. Where possible, it would be helpful to administer re-entry training not only to the repatriates and their families but also the employees in the head office to which the repatriates return (The Sunday Times, 19/12/1993, p.5). This fosters mutual acceptance. Companies in which communication among, and within the ranks is less than effective, will benefit even more in this way.

Having gone through the flowchart in Figure 3.1, we total up the scores obtained after examining each determinant of CCT need. The result is the aggregated CCT need. It is realised that the aggregate, which is the intensity of CCT need expressed in numerical form, ranges from -2 to 14 (see Figure 3.2). The higher the numerical value, the higher

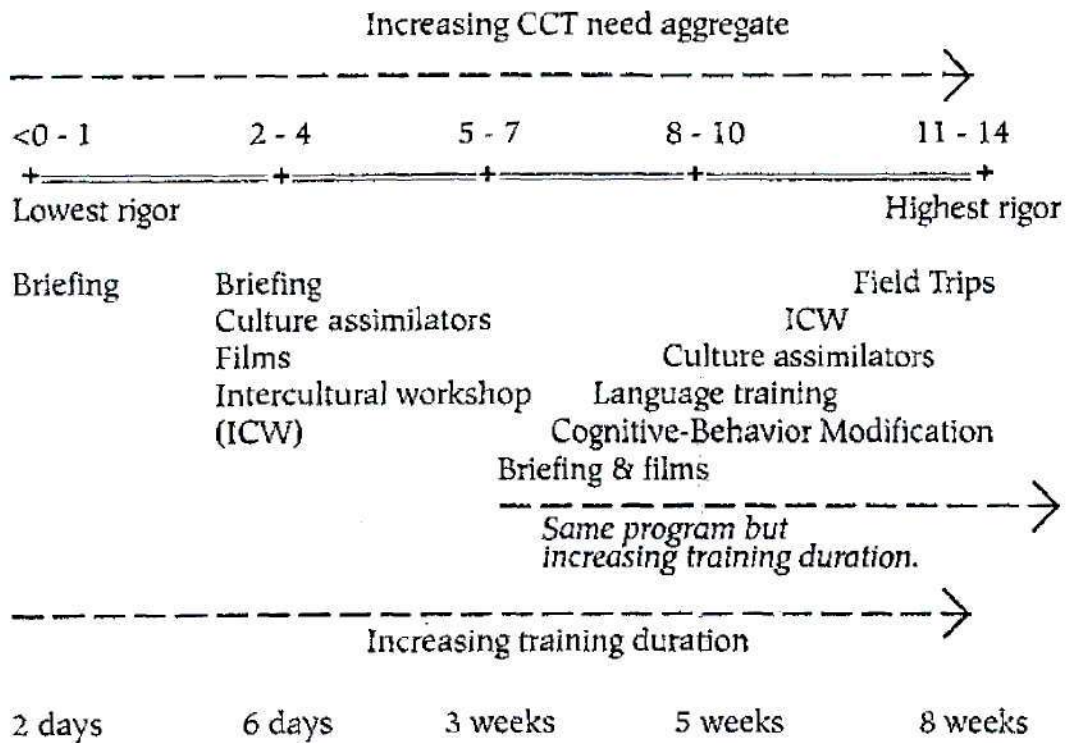
the CCT need. Translated into figure 3.2, this means that the higher the aggregate CCT need, the more rigorous the required training.

This is consistent with the Social Learning Theory. A high need for CCT is the result of the fact that it is difficult for the trainee to focus at, retain and reproduce what is learnt, in view of the novelty of the job, host culture, and high intensity of cross-cultural interaction. To help him learn better, training rigor has to be increased. The rigor of the training forces the trainee to pay closer attention. As a result he can retain the acquired information, skills and behaviours better. In turn, reproduction of what is learnt becomes more effective.

Rigor is defined by the richness of the training programs; comprising of training methods ranging from environmental briefing to a pre-posting site visit (field trips). Referring to Figure 3.2, we see that there are essentially three training programs targeted at three broad levels of CCT need: low, mid and high. A low CCT need aggregate ranging from -2 to 1 is indicative of low CCT need. Only the lowest training rigor is required. As such, a 2-day environmental briefing in the form of lectures and films, which appeal to the trainees' symbolic modelling process, will suffice.

For a moderate CCT need aggregate ranging from 2 to 4, more training rigor is necessary. This is matched by the addition of two CCT methods. The culture assimilators appeal to the trainees' "verbal" participative modelling process and help generate culture-specific awareness. The Intercultural Workshop (ICW) appeals to their "physical" participative modelling process and generate cultural- general awareness. The case-based training provided by the culture assimilators is expected to be welcomed by the highly-educated managers, who are competent cognitive learners with developed analytical power. The action-based training provided by the ICW will alert managers to the importance of being proactive in preempting change. This will also subtly attune them to attitudinal flexibility. The training duration is correspondingly increased to 6 days. This stage focuses on answering the managers' need to know about the target culture and helping them develop relational skills.

Figure 3.2
Recommended Training Model for Managers



Source: Copied from Young-Chul & Chun (1995)

A CCT need aggregate of 5 and above require even higher training rigor. This calls for three more CCT methods. Cognitive-Behaviour Modification deepens the symbolic modelling process by focusing on illustrating acceptable and unacceptable behaviours specific to the target culture. It further satisfies the manager's characteristic need to feel safe, to know as much as possible. Language training is a must at this stage. The field trip serves up the highest rigor. By immersing the manager in the foreign culture before actual departure, we engage him completely in the experiential learning of relational and problem-solving skills. Participative modelling on his part is arguably at its highest. The training duration, correlating with the three categories of higher-end aggregated CCT need (5-7, 8-10 and 11-14), is, at minimum, two to three, four to five or six to eight weeks long, respectively.

The general approach is to first introduce the manager to cognitive learning in the form of lectures and cases, with which he is more familiar and hence more receptive to. Gradually, he is introduced to the more recondite information and to action-based experiential learning in the form of ICWs and pre-posting site visits. Based on the SLT, it is expected that this will deepen his understanding and retention of the information, cultural insights and relational skills acquired. The training program is successful if as a result he can reproduce the desired behaviour proficiently.

Besides ICWs, all the other recommended CCT methods are culture-specific in approach. It is important to impress upon the employee the specifics of the host culture and let him/her discover what aspects of his character is likely to clash with that of the natives. Since the employee is eager to create and maintain stable relationships, he/she should be ready to modify his/her behaviour accordingly.

For synergistic effects, the training will be jointly conducted by home country trainers and trainers from the target culture. Thus, the manager can get a more comprehensive perspective of cross-cultural effectiveness. This concept of bicultural training teams has been adopted successfully by Intel Corporation (Odenwald, 1993). For our purposes, the use of trainers is also necessary because this way of delivering CCT is both time-saving and cost-effective. The American Society for Training and Development (ASTD) discovered that the design and development time per learning hour for instructor-led training is about 30:1 or 40:1 hours, compared to other training-delivery methods like self-paced video and distance-learning, which yield a much higher ratio of 100:1 to 200:1 hours. The most expensive instructor-led training costs close to \$6000, while other delivery methods can cost close to \$10,000 at least (Kimmerling, 1993).

For budding MNCs, it is advisable to centralise the training function at the headquarters. This allows resources to be pooled rather than stretched. The training function can then gain the necessary training experience to be more effective in future, and to gain the trainees' and the senior management's confidence. As a guide, here is a highlight of some of the findings made by the ASTD benchmarking forum, whose members are some of the most successful American corporations (Kimmerling, 1993):

- Total annual training expenditure as a percentage of payroll ranges from 1.5% to 5%
- Number of training days per employee per year ranges from 2 to 7
- Total annual training expenditure per employee ranges from \$800 to \$1000

The ASTD members make use of benchmarking to identify the best training practices. This is possible because benchmarking calls for information sharing. In this way, training as a strategic competitive tool is continuously sharpened. Clear returns on training investments become visible.

3.5 Conclusion

The interplay of job novelty, degree of interaction and culture novelty determines the degree of training rigor. The recommended training model takes into consideration the required training intensity and the profile of the expatriate manager.

The recommended training methods are intended to provide the type of CCT that best fit the expatriate manager. The concept of benchmarking for identifying good CCT practices is also mooted.

In view of the business world's state of constant flux, corporations like Intel have resorted to Just-in-time CCT (Odenwald, 1993). We may want to go one step further by introducing preemptive CCT. This means that the training department organises topical courses on selected countries that are deemed to be potential growth areas.

For companies that are new to CCT, fresh emphasis on this aspect of global competition may entail significant re-engineering of organisational culture and individual value system. How traumatic the changes are, and how much resistance is displayed, depend on the organisation's and the individual's determination and mental readiness to succeed globally.

The importance and complexity of CCT imply that companies cannot afford to be haphazard in their attitude towards expatriation. A 4-step method to determining the trainees' level of CCT need has been proposed. On the basis of the intensity of their CCT need, the trainees participate in one of the three recommended training programs, each representing a different degree of training rigor to match the training needs.

To prepare the typical manager effectively, the CCT begins with the intellectual training approach, before blending in the experiential approach for learning synergy. The assumptions are that as a citizen of a culturally diverse country, one is more adept to cognitive learning and is more in need of culture-specific rather than culture-general CCT. The focus is on developing his attitudinal flexibility. Centralisation of the training function, preemptive CCT and benchmarking for training excellence are also discussed, with a view to reinventing the value of CCT and inviting further discussion on how attention to CCT in MNCs can be promoted.

The CCT model specifically targeted the expatriate or to-be-expatriated managers. Although it is assumed that their family members would also be relocated, to model the combined CCT needs of the expatriates and their family members would complicate the recommended CCT model. Another limitation of this study is issues that may draw the readers' attention in the course of examining this study have been left unanswered. These issues, such as trainer competency, conflict of interest and trainees' adjustment problems, together with, the resultant costs to the individuals, their families and their companies, merit indepth study. In the interest of conducting a more focused study, these issues are not discussed in this study, but it is hoped that they will stimulate future research.

Finally, the recommended general CCT model is meant to be adapted to specific companies' unique business realities, not adopted wholesale.

CHAPTER 4: RESEARCH METHODOLOGY

4.1 Introduction

This chapter outlines the qualitative approach used in this study. The methodology provided a basis for answering the research questions underlying the study. According to Cooper & Schindler (2003:63), the section of a study describing the methodology is an important one, describing at least five parts: sampling design, research design, data collection, data analysis and limitations.

For the purpose of comprehensiveness this chapter will not only cover the five sections identified above, but will also discuss the problem statement and research objectives of this study and include a section on method and research ethics approval and confidentiality.

4.2 Problem Statement and Objectives

The adage “a problem well defined is a problem half solved” is worth remembering. This adage emphasizes that an orderly definition of the research problem gives a sense of direction to the investigation. Careful attention to problem definition allows a researcher to set the proper research objectives. If the purpose of the research is clear, the chances of collecting the necessary and relevant information will be much greater (Zikmund, 2003:60-61).

4.2.1 Problem Statement

According to Cooper & Schindler (2003:662), the problem statement includes the need for the research project. The problem is usually represented by a management question and is followed by a more detailed set of objectives.

As indicated in Chapter 1, it is important that enterprises must select managers who, with their families, will be able to adapt internationally and who possess the necessary expertise to get the job done in that foreign environment. Many enterprises that lack experience in international operations, as they try to increase their foreign sales, overlook the importance of cultural variation in other countries. This attitude, combined with the enterprises' inclination to choose employees for the expatriate experience because of their technical abilities, generally leads to international assignments being made without the benefit of training or help in acculturation. This may - and all too often does - lead to failure in the foreign assignment, with a premature return to the parent company and country, or even dismissal in the foreign locale (Briscoe & Schuler, 2004). Scullion & Linehan (2005) add that success depends to a large extent on cross cultural adaptation, as well as selection and training practices.

In order to avoid the costly failure of expatriates it is important to realise that psychological and emotional peace of mind is the single most important element for the successful relocation of an employee and members of his or her family abroad. It is important to select the right employee and then provide the individual with the proper cross-cultural training, support and services that will position him or her to be successful (Anon, 2002). Fontaine (1997) echoes this view, stating that the success of international assignments can be ensured if effective preparation, support and training are provided. In light of the fact that the success of expatriates on an international assignment is influenced by the preparation, support and training they receive, the lack of such support could contribute towards the current and future failure of expatriates on international assignments.

4.2.2 Objectives of the study

After identifying and clarifying the problem, researchers should make a formal statement of the problem and the research objectives. A decision must initially be made as to precisely what should be researched, so as to decipher the type of information that should be collected and provide a framework for the scope of the study, or the research project.

The objective of this research is to determine what MNEs should do in terms of providing adequate cross cultural training for the expatriate. As was seen in the previous chapters, ill-prepared expatriates tend to fail – come home from international assignments early - and as a result are incurring direct and indirect losses for their enterprises.

4.3 Research Ethics Approval and Confidentiality

Prior to conducting this research, authorization was obtained from the University of Kwa-Zulu Natal Research Ethics Committee. To maintain confidentiality, the researcher undertook not to disclose the interviewees' personal details, including names, addresses, telephone numbers and any commercial plans or business activities. All data were aggregated in the thesis.

4.4 Method

Predominantly there are two types of research methods, a qualitative and a quantitative approach. The former approach uses methods to collect descriptive and contextually situated data to seek an understanding of human experiences (Mann and Stewart 2000). The latter approach presents data as numerical relationships and typically has a formalized form and style (Glesne and Peshkin 1992). This study was undertaken using qualitative research methods, which Maxwell (1996) identifies its strength to be their inductive approach. The qualitative approach was ideal for this research project for two main reasons: (1) theories and results are derived that are understandable and experientially credible to the sample group and others and (2) conducting formative evaluations will help to improve existing literature rather than simply assessing the value of it. Therefore a quantitative approach was believed to be insufficient, as presenting data in numerical terms would not have captured the human element of the responses or provide in-depth explanations that were sought after (Van Maanen, Dabbs and Faulkner 1982).

4.5 Sampling Design

The basic idea of sampling is that by selecting some of the elements in a population –the total collection of elements about which we wish to make some inferences – we may draw conclusions about the entire population. There are several compelling reasons for sampling, including: lower costs, greater accuracy of results, greater speed of data collection and availability of population elements (Cooper & Schindler, 2003).

According to Zikmund (2003), the first question related to sampling concerns identifying the target population, that is, the complete group of specific population elements relevant to the research project. At the outset of the sampling process, it is vitally important to carefully define the target population so that the proper source from which the data are to be collected can be identified. Answering questions about the critical characteristics of the population is the usual technique for defining the target population.

Initially, all participants were my work colleagues. Thereafter, all participants were asked whether they knew of any other expatriates, repatriates or spouses who may be interested in being involved with the research project. Participants helped by contacting other friends or colleagues who might be interested. However it was relatively difficult to find participants who were willing to take part in personal interviews. Overall, it was relatively easier to gain commitment from participants if there was an opportunity to communicate with them initially over the telephone to answer any questions. From this point, arrangements were made for a personal interview at a mutually agreed upon place. In all four cases where the researcher was able to talk to the potential participant over the telephone, he/she agreed to be interviewed personally.

Recruiting participants for emailed responses was much easier than finding participants for personal interviews. This was because emailed responses overcame the issue of the physical location of the respondent. Interested members were able to email the researcher directly.

All respondents found the interview questions clear and relevant. Participants responded well to the questions and were more than happy to share their experiences. Overall, the responses were of a good quality and depth, confirming the appropriateness of a qualitative approach to this research as opposed to a quantitative approach.

The break down of respondents is as follows;

	REPATRIATES	EXPATRIATES
Personal Interviews	2	6
Emailed Responses	1	11
Total by Category	3	17
TOTAL	20	

Table 4.1 Summary of participants

4.6 Research Design

In order to increase its validity and reliability, the questionnaire for this study was partly developed by integrating the research objective and literature review. The questionnaire consisted of two parts. The first part consisted of multiple choice and demographic data, and the second part consisted of open ended questions pertaining to expatriate adjustment.

Demographic Factors

The questionnaire began with individual background variables: age, educational level, expatriation duration, gender, marital status, length of assignment, level of foreign language proficiency, level of formal cross-cultural experience before this assignment, and relevance of cross cultural training to work performance.

Cross-Cultural Adjustment

Interview questions were formulated after a review of the existing literature on expatriate management to ensure sharper and more insightful interview questions about the topic (Yin 1994). As the current literature on expatriate management lacks standardized questions, questions needed to be developed. The questions were deliberately designed to be open-ended and to avoid leading questions. The interview questions for the expatriates

and repatriates (termed (re) expatriates) centred primarily on exploring their experiences, or lack thereof, of cross-cultural training. A pilot test was first conducted with one participant, a repatriate, to determine whether the interview questions were understandable and applicable in addressing the issues of the study.

In the analysis of the data collected, responses from expatriates and repatriates were presented together. Respondents were able to record multiple answers to any particular question. Patterns and trends were then identified and presented. Some direct quotes were used from the participants, who remained anonymous, and reported in the results chapter. The quotes chosen were insightful and provided evidence for the support or lack of support for propositions.

4.7 Data Collection

Data was collected in two ways: personal interviews and emailed responses. Firstly, personal interviews were conducted in the form of semi-structured interviews. This format allowed the researcher to encourage conversations from participants, and gave participants the flexibility to contribute additional information that they thought were relevant to the research topic (Mann and Stewart 2000). Interviews took place at a mutually agreed place and time, and all personal interviews were recorded on audiotape and subsequently transcribed. The tape recording helped maximize accuracy and enabled the researcher to concentrate on the quality of the responses rather than on writing down the responses.

The use of the semi-structured, open-ended questionnaire is described by Jankowicz (1995:195) as being characterized by the fact that:

- Content and sequence are not fully specified in advance, but the researcher has a clear idea of his/her purpose.
- Questionnaires are open-ended, so respondents are encouraged to use their own words.

- While a script of guideline questions may be developed, the researcher's actual questions will be led by the prevailing atmosphere and rapport between the participants.

There are four techniques that can be used, namely, conversation, the individual interview, key informant interview and focus group. Content analysis is the main technique of analyzing the mass of data that will come out of the open-ended responses.

The second means of data collection was via e-mailed responses to identical interview questions. All documentation was emailed to potential participants in advance so that they were aware of what types of questions would be asked. Eleven people were contacted by e-mail and all responded. Those who agreed e-mailed responses back within a week. The researcher chose this second mode of data collection, as it presented many advantages (Mann and Stewart 2000). Firstly, it has the ability to obtain a larger sample group. This helped to increase the relevance of generalizing the findings because it applied to more people. Secondly there was significant time and cost savings, especially when all personal interviews needed to be transcribed. Lastly, e-mailed responses allowed the respondents to answer the questions in their own time and at their own pace, which helped facilitate in-depth and well thought-out responses.

4.8 Data Analysis

Data analysis usually involves reducing accumulated data to a manageable size, developing summaries, looking for patterns and applying statistical techniques. Scaled responses on questionnaires and experimental instruments often require the analyst to derive various functions, as well as to explore relationships among variables (Schindler & Cooper, 2003). Chapter 5 provides an analysis of the data collected.

4.9 Limitations

The greatest limitation of this study was the sample size. In total only 20 responses were received (n=20). When HR managers in charge of the expatriates were contacted the following excuses for why they did not want to participate in the research were given”

- They did not want to participate in the research because they were afraid that the information on their expatriates might leak out and another MNE might steal their expatriates.
- They would consider the request; but when the MNE was called back the employee could not be found or would not respond
- Some HR managers refused to participate without providing a reason.

Four e-mailed survey responses were not received from expatriates. Follow-up reminder e-mails were sent to the prospective candidates, to no avail. Furthermore, two interviews with expatriates were cancelled without notice and efforts to reschedule were unsuccessful.

The data collected will be presented and analysed in the following chapter.

CHAPTER 5: ANALYSIS OF RESULTS

5.1 Introduction

The results of the research will be presented in this chapter. The objective of this study is to evaluate the effectiveness of the orientation process for expatriates and to determine a need for a separate orientation and culture training. By improving the orientation process and identifying a need for culture specific training, the company can thus eliminate relocation and replacement costs.

In light of the above statement, the results of the research proved quite interesting, in that none of the expatriates who responded, either by personal interviews or email, ever had any type of cross cultural training whatsoever!

The questionnaire consisted of two parts. The first part consisted of multiple choice questions which focused on marital status; length of expatriate tenure; level of foreign language fluency; level of formal cross-cultural experience before this assignment; when was the most recent cross-cultural training conducted; whether the knowledge gained from the cross-cultural training helped the expatriate perform his/her daily job; how much of the training was actually applicable to perform their job; the most important characteristic that an expatriate manager must possess; and what, in their opinion, based on Tung's findings, is the main reason for expatriate failure.

The second part of the questionnaire consisted of semi-structured questions. The limitation of this was seen in the response to emailed questionnaires. Respondents did not elaborate on their answers. For example, in response to the question "what were the cultural differences that you found most challenging?" one respondent replied "the African setting is a more different setting in terms of culture and they are just different".

5.2 Descriptive Statistics of Demographic Factors

In this section descriptive statistics were utilised to analyze demographic factors. These included individual information such as age, gender, nationality, region of assignment, marital status, expatriation duration, and level of foreign language fluency, previous cross-cultural experience, previous overseas experiences, and important characteristics of expatriate managers as well as the reason for expatriate failure.

5.2.1 Age

The sample consisted of 20 participants, 11 participants (55 percent) were under the age of 30. 2 participants (10 percent) were between 31 to 35 years old. 4 participants (20 percent) were between 36 to 40 years old. 2 participants (10 percent) were between 41 to 45 years old, and 1 participant (5 percent) did not answer this question. Table 5.2.1 reports the frequencies, and percentages associated with age.

Table 5.2.1 Description of Age

Age	Frequency	Percent %
Under 30	11	55
31-35	2	10
36-40	4	20
41-45	2	10
N/A	1	5
Total	20	100.0

Church (1982) demonstrated that age was related to the level of interaction with host nationals. In general, results showed that young expatriates had a higher level of social contact with host nationals than older expatriates.

Studies of the outcomes of domestic transfers have shown varied results when the age of employees was linked with willingness to shift domestically. According to Gould and Penley (1985), Sell (1983) and Veiga (1983) it was revealed that younger employees were more willing to transfer their workplace than older employees. In contrast, the research results of Brett and Reilly (1988) demonstrated that there was no significant

relationship between age and willingness to transfer. From an international standpoint, Brett and Stroh (1995) demonstrated that no significant relationships were discovered in two studies that investigated age and employees' willingness to join the adventure of international expatriate assignments.

5.2.2 Gender

The number of female participants accounted for only 5 participants (25 percent) of the total sample (20), while the number of male participants was 15 participants (75 percent); Table 5.2.2 reports the frequencies and percentage associated with gender.

Table 5.2.2 Description of Gender

Gender	Frequency	Percent %
Female	5	25
Male	15	75
Total	20	100.0

Probably an important hurdle for women in management in most countries is the persistent stereotype that associates management with being male. Organizations tend to expect men to hold higher-status positions and their standards for success are likely to reflect characteristics that are stereotypically male (Cockburn 1991; Ely 1995; Rubin 1997). While women are attaining higher levels of educational achievement and the number of female expatriates is growing, progress is slow. Differences in accepting women in management vary by country. This is shown, for example, in the study conducted by Hofstede (1989). Some cultures were found more challenging to women than others. He suggested that women are less effective because of cultural biases against them; cultures that rate higher in 'masculinity' look less favorably on women as professionals. However, qualitative field research involving interviews with women on different foreign assignments, including countries such as Japan and Mainland China where considerable male dominance exists in business circles, have failed to identify culturally-driven obstacles to their international business success that would support a preference for males over females (Napier and Taylor 1996). Additionally, Caligirui and

Cascio (1989) hypothesized that female expatriates, as compared with male expatriates, may be negatively stereotyped by host countries, particularly in nations that do not value women in important positions. Only a few studies (Adler 1987; Napier and Taylor 1996) illustrated that there were no significant differences between male and female expatriates in their work adjustment in high masculine dominance societies such as Asia.

The international human resource management literature has given insufficient attention to women as expatriates, 'probably because international assignments have long remained a male preserve' (Harris 1995; Smith and Still 1996, p.2; Windham International 1999). Nevertheless, international enterprises cannot any longer afford to limit their pool of talented human resources by excluding employees belonging to a particular group. Now is the time for multinationals to enlarge their recruitment base (Paik and Vance, in press). Even though many enterprises have reexamined their reluctance to post women abroad, the number of female expatriates is still relatively low, although the trend is increasing. From a significant percentage reported in the early 1980s of about 3 percent (Adler 1984), more recently reported figures seem to be around 12 to 15 percent (Caligiuri, Joshi and Lazarova 1999; Florakowski and Fogel 1999; Global Relocation Trends 1996 Survey Report 1997). Previous research (Anderson, Milkovich and Tsui 1981; Markham, Macken, Bonjean and Corder 1983; Markham and Pleck 1986) demonstrated that there is a tendency toward female employees being less willing to take on expatriate assignments, and the gender of employees has mainly exposed a constant standard of relationships for domestic transfer. On the other hand, a study of international transfer by Brett and Stroh (1995) indicated that there has not been a significant connection between employee gender and willingness to transfer. Adler (1987) reported that American female expatriates are performing their international assignments as efficiently as male expatriates, even in male-dominated cultures such as Japan and Korea. Asian entrepreneurs regard a female expatriate first as a parent company representative, second as a foreigner, and third as female. Fundamentally, the first two issues combine to render the expatriate's gender a 'non-issue'. Moreover, Adler (1984) stated that male and female, in both dual-career and single-career conditions were similarly likely to be attracted to and successful in international assignments. In fact, females are not only

expected to be equally efficient in expatriate assignments, they may possibly even have superior abilities for international assignments (Tung 1995). This may be because females are inclined to have higher quality communication skills and a better capability of constructing relationships. Both abilities are important attributes of successful expatriates. Moreover, contrary to the traditional prevalent corporate viewpoint and practice, results of the study by Westwood and Leung (1994) suggest that, in terms of disposition, women may often be better suited for expatriate assignments than men. For example, they reported that in their qualitative results, a number of female expatriate respondents perceived that women benefited from being more sensitive, interpersonally aware, empathetic and sociable than men. The finding is interesting since it implies that women are naturally better suited to cross-cultural situations, and may be more appropriate candidates for overseas assignments than men (Westwood and Leung 1994, p.69).

5.2.3 Nationality

The sample consisted of 1 American participant (5 percent), 1 Congolese participant (5 percent), 4 Indian participants (20 percent), 1 Ivorian participant (5 percent) 4 Kenyan participants (20 percent), 2 Nigerian participants (10 percent), 6 South African participants (30 percent) and 1 participant (5 percent) who did not state nationality.

Table 5.2.3 Description of Nationality

Nationality	Frequency	Percent %
American	1	5
Congolese	1	5
Indian	4	20
Ivorian	1	5
Kenyan	4	20
Nigerian	2	10
South African	6	30
N/A	1	5
Total	20	100.0

5.2.4 Nation/Region of Expatriate Assignment

The sample consisted of 1 participant (5 percent) who was expatriated to Germany, 14 participants (70 percent) were on assignment in South Africa, 1 participant (5 percent) was expatriated to Tanzania, 1 participant (5 percent) was on assignment in the United Arab Emirates, and 3 participants (15 percent) were on assignment in the United Kingdom.

Table 5.2.4 Description of Country of Assignment

Nation/Region	Frequency	Percent %
Germany	1	5
South Africa	14	70
Tanzania	1	5
United Arab Emirates	1	5
United Kingdom	3	15
Total	20	100.0

5.2.5 Marital Status

There were 6 participants (30 percent) who were married with child(ren), 6 participants (30 percent) were married with no children, 7 participants (35 percent) were single and 1 participant (5 percent) was divorced.

Table 5.2.5 Description of Marital Status

Marital Status	Frequency	Percent %
Married with child(ren)	6	30
Married with no children	6	30
Single	7	35
Divorced	1	5
Total	20	100.0

Researchers into domestic transfer of workplace and international transfers normally agree with the concept that single individuals have a higher willingness to transfer to international assignments than married individuals (Brett, Stroh and Reilly 1990). Married individuals perhaps must consider various family issues, such as the effect of

children and family members on international mobility, that is a more fundamental anxiety than marital status. Correspondingly, Evans, Lank, and Farquhar (1981) verified that expatriate families with teenage children had a diminished degree of interest in geographic mobility. Owing to social and educational disturbances for children and family members the parents of teenage children have been more unwilling to transfer to new regions (Gould and Penley 1985). In contrast with this situation, married couples without children have usually been more willing and interested to transfer to overseas assignments than those couples with children (Brett and Stroh 1995; Brett, Stroh and Reilly 1990).

5.2.6 Duration of Expatriate Assignment

Results indicated that 5 participants (25 percent) had been on assignment for more than 4 years, 2 participants (10 percent) had been on assignment for between 2 to 4 years, 6 participants (30 percent) had been on assignment for between 1 to 2 years and 7 participants (35 percent) had been on assignment for less than a year.

Table 5.2.6 Description of Duration of Expatriate Assignment

Years	Frequency	Percent %
More than 4 years	5	25
2-4 years	2	10
1-2 years	6	30
0-1 year	7	35
Total	20	100.0

Researchers such as Pinder and Schroeder (1987) suggested that the duration of stay in a host country has implications for relocated individuals to become efficient in their assigned job. Consequently, an hypothesis underlying the length of stay in a host country is that the longer they reside in a host country, the more familiar expatriates become with their jobs and working conditions, and as they become more familiar, the better their performance will become (Black 1988; Kawes and Kealey 1981). In addition, Nagai

(1996) recommended that the length of stay in a host country be considered a significant factor relating to successful performance.

5.2.7 Level of Foreign Language Fluency

There were 17 participants (85 percent) who were fluent in the foreign language, 2 participants (10 percent) were somewhat fluent and 1 participant was weak regarding foreign language fluency. Table 5.2.7 reports the frequencies and percentages associated with foreign language fluency.

Table 5.2.7 Description of Foreign Language Fluency

Level	Frequency	Percent %
Fluent	17	85
Somewhat Fluent	2	10
Generally able to communicate	0	0
Somewhat able to communicate	0	0
Weak	1	5
Total	20	100.00

5.2.8 Previous Overseas Experience

There were 2 participants (10 percent) who had at least 2 years experience of living/working overseas, 3 participants had at least 1 year of overseas living/working experience, 1 participant (5 percent) lived abroad for at least a 3-4 week period of time and 14 participants (70 percent) had no prior overseas experience at all. Table 5.2.7 reports the frequencies and percentages associated with overseas work experience.

Table 5.2.8 Description of Overseas Work Experience

Overseas Experience	Frequency	Percent %
At least 2 years of overseas living/working experience	2	10
At least 1 year of overseas living/working experience	3	15
Lived worked abroad for at least a 3-4 week period of time	1	5
No prior overseas experience at all	14	70
Total	20	100.0

Past foreign experience affects how confident an expatriate will feel in a new country, and is positively related to success in a global assignment (Bochner et al. 1971, Bochner et al. 1986; Brein and David 1971; Church 1982; Searle and Ward 1990). Previous international experience has been recommended as a significant factor in employee adjustment during international assignments, as well as an attribute related to willingness to adopt overseas assignments. Torbiorn's (1982) research demonstrated that individuals initiate anticipatory adjustment to an overseas culture before their actual arrival, and their motivation to adjust powerfully influences their subsequent cross-cultural experience. Church (1982) stated that based on international adjustment literature, it seems logical to report that previous international experience may be an important issue of information from which precise expectations can be formed. Based on the fundamental concept of uncertainty decrease expressed as above, the higher expectation should be created, according to that several previous international adjustment experiences that would offer more information from the uncertainty, which could be abridged and precise expectations created. In addition, Black et al. (1991) stated that if the previous experiences were in the same or similar culture to the one that the individual would enter, they would be a superior source from which accurate expectations could be formed, rather than previous experiences in a dissimilar culture. Since expatriates are often expected and required to learn new social and cultural skills in the new cultural environment, the resulting adjustment will primarily be socio-cultural. From a slightly different point of view, Bell and Harrison (1996) argued that it is the process of having learned a different culture, rather than the content knowledge of another culture, that is the most important benefit of previous international experience. Such individuals could capitalize on the decreasing marginal effort associated with acquiring skills in another culture (Niyekawa-Howard 1970). Correspondingly, Church (1982) and Stening (1979) reported that if the previous experiences were work-related, they would facilitate the construction of precise work expectations. In contrast, if the previous experiences were not work-related, for example, previous experiences concerning study overseas, they would facilitate the construction of non-work expectations. Even though studies of adjustment after a domestic relocation transfer by Pinder and Schroeder (1987) failed to find a significant correlation between the number of previous domestic transfers and adjustment, research into cross-cultural

adjustment by Torbiorn (1982) and Black (1988) provide some support for the proposition. This discrepancy may derive from the larger amount of adjustment required for a cross-cultural adjustment versus a domestic adjustment and, as a result, the amount of training that may be learned from previous international experience and applied to the current international transition (Black et al. 1991). Black (1988) initially found that previous international experience was positively related to expatriate adjustment, but a later study found no such significant relationship (Black and Gregersen 1991). However, subsequent empirical research findings have been more consistently supportive. For instance, McEvoy and Parker (1995) reported a positive association between prior international experience and general adjustment and Shaffer and Harrison (1998) found a positive relationship between prior international experience and the critical dimension of interaction adjustment. Regular and related previous experiences can facilitate the formation of accurate expectations; likewise, pre-departure cross-cultural training can also facilitate the same objective. Basically, cross-cultural training offers expatriates' functional information for lessening uncertainty connected with the forthcoming international shift, and for structuring precise expectations about living and working in the host country. It is significant to comment that this sort of training does not necessarily need to be company-sponsored; it could be self-initiated (Black et al. 1991). Normally, this kind of training need not immediately precede the international relocation, even though organizations and individual would anticipate that supplementary recent training would have a powerful outcome (Black and Mendenhall 1990; Brislin and Pedersen 1976). Because previous international experience is connected to anticipatory adjustment as well as attitudes toward international assignments (Black 1988), previous international experience should be connected to willingness to accept these assignments. Previous international experience should diminish the uncertainty normally related with relocation, and reduced uncertainty should result in higher willingness for international assignments. Some employees tend to support this suggestion. Louis (1980) reported that those having had prior international experience formed more realistic expectations regarding international assignments. Ronen (1989) demonstrated that employees with previous international experience were more likely to accomplish goals in international assignments, even if the employees' previous experience was in a different country. The

same author also revealed that the expatriate's exposure to multicultural socialization processes would improve the individual's probability of achievement in an expatriate assignment. Finally, other researchers such as that of Bret (1982), and McAllister and Kaiser (1973) have recommended that many employees who anticipated negative results of relocation, which never actually materialised. For that reason, if individuals do not experience anticipated negative outcomes, then having had international experience may make them less anxious and more willing to move overseas for potential assignments.

5.2.9 Previous Cross-Cultural Training

None of the 20 participants received cross-cultural training prior to their assignment.

5.2.10 Most recent Cross-Cultural Training

There was 1 participant (5 percent) who received cross cultural training at least 6 months ago, 1 participant (5 percent) received training at least a year ago and 18 participants (90 percent) who received no cross cultural training whatsoever. Table 5.2.9 reports the frequency and percentages associated with most recent cross cultural training.

Table 5.2.10 Description of most recent cross-cultural training

Most recent cross cultural training	Frequency	Percentage
At least 6 months ago	1	5
At least 1 year ago	1	5
N/A	18	90
Total	20	100

5.2.11 Important characteristics of Expatriate manager

There were 2 participants (10 percent) who thought that self awareness was an important characteristic, 1 participant (5 percent) felt that self motivation was the most important characteristic, 5 participants (25 percent) felt that empathy was most important, 11 participants (55 percent) felt that social skill was the most important characteristic and 1 participant (5) percent felt that technical problem solving skills and knowledge were most

important. Table 5.2.10 reports the frequency and percentage regarding the characteristics for an expatriate manager to have.

Table 5.2.11 Characteristics of an Expatriate Manager

Characteristic	Frequency	Percentage
Self awareness	2	10
Self regulation	0	
Self motivation	1	5
Empathy	5	25
Social Skill	11	55
Technical Problem solving skills and knowledge	1	5
Total	20	100.00

5.2.12 Reason for expatriate failure

There were 7 participants (35 percent) who felt that the inability of manager's spouse to adjust to the new environment was the main reason for expatriate failure, 7 participants (35 percent) attributed failure to the manager's inability to adapt to the new environment, 4 participants (20 percent) felt it was due to the manager's personality or emotional maturity, 1 participant (5 percent) attributed it to the manager's inability to cope with responsibilities associated with the overseas work and finally 1 participant (5 percent) stated that it was due to the manager's lack of technical competence. The results are interesting in that they correlate to Thomas (1998) and Tung's (1988) statement that an overwhelming majority of these failures is attributed to the expatriate's and/or spouse's inability to adapt to the new culture. Table 5.2.11 reports on the frequency and percentage regarding the main reasons for expatriate failure.

Table 5.2.12 Main reasons for expatriate assignment failure

Reasons	Frequency	Percentage
Inability of manager's spouse to adjust to the new environment	7	35
The manager's inability to adapt to the new environment	7	35
Other family related issues	0	0
The manger's personality or emotional maturity	4	20
The manager's inability to cope with responsibilities associated with the overseas work	1	5
The managers lack of technical competence	1	5
Total	20	100.00

5.3 Open-ended questions

As it is not possible to cover all the possible variables included in the preparation, support and training of the expatriates, the expatriates were also given 5 open-ended questions. The first question asked the participants to list the key challenges that they faced during the overseas assignment. In the second question they were asked what the cultural differences that they found most challenging were. In the third question they were asked to state the personal strengths that they found were most helpful during their assignment. In the fourth question they were asked if they received any other type of training or support from the MNC and finally, in the fifth question, they were asked to make recommendations for the preparation of expatriate managers.

The following responses were received:

Question 1: *What were the key challenges you faced during each overseas assignment?*

- Knowledge of the labour laws applicable to the host country.
- Adjusting to the people and to the new work environment.
- Adapting the food was a huge challenge, and still is.
- Acclimatising to the new environment.
- Weather: I can not stand cold weather.
- Language problem in some countries where they do not speak English widely.
- It is pretty difficult to adjust to a new environment quickly.
- At times, one feels that you've lost your freedom to mobility as here the place is not safe to on the roads. The crime news you read/watch really scares you a lot.
- A key challenge was to adapt to this culture of cars and no walks.
- Here, no one even knows who your next door neighbour is.
- At work and at your residential place it's the same people hardly speak to each other and if they do, it is only a formality of hi or hello. It seems as though everyone is living an artificial life.

Question 2: *What were the cultural differences that you found most challenging?*

- Language.
- The expatriates experience problems with pronunciation/dialect.
- Cultural differences are not a problem to me, not at all. I easily adapted myself to all environments I have been in.
- Training should be provided to expatriates on how to handle situations where despair and loneliness set in. The management of the MNE should also go through training to understand and create awareness of the host country, its business and social environment and to understand what the expatriate is experiencing and going through.
- The family values and the importance of relations differ in each country, especially as you move from continent to continent.
- People are not warm like the people from my home town.

Question 3: *Which personal strengths did you find most helpful during your overseas assignment?*

- I am really focused when I am involved in a specific assignment. I am available even during weekends and late at night (single expatriate response).
- Common sense and the ability to learn the culture/language fast.
- The support of one's spouse, who is there at all times to support and encourage.
- While moving out, one should be well prepared mentally that life is not going to be the same as your homeland and that you will have to face many challenges. So one must be prepared for those challenges.
- Communication skills.
- Ability to adapt to change.
- The ability to see the positive in everything.
- Realise that everyone is different and to respect and appreciate the differences in all.
- To listen and wait for people to complete their sentences before speaking.

Question 4: *What type of training (or other types of support) did you receive from your firm?*

None of the candidates received pre-departure training. However, a few candidates used this question as a platform to put forward recommendations for training.

- First-time expatriates should have a thorough induction from a senior staff member/expatriate on the new job functions two weeks prior to the assignment.
- On-the-job training (in-country and abroad).
- Formal trainings, classroom training (in-country and abroad).
- Web-cast trainings.
- Better communication of lessons learnt from expatriates that are already operational in the same environment. The more you know before the time the better you can adapt and the sooner you can start adding value.
- The only information that could be done prior to arrival had to be done by doing own Internet research.
- The trailing spouses should form support groups with spouses of expatriates coming from the same home country.
- All expatriate candidates and their spouses should be questioned by qualified personnel to ascertain if they can live away from their family.
- None
- The people in the bank (international bank employee) are always with international perspective and that helps with the adjustment.

Question 5: *What are your recommendations for future preparation of expatriate managers?*

- A session with a psychiatrist should be arranged for the expatriate and his or her spouse.
- Have global perspective, know the culture/customs well before travelling, clearly identify the motivation factors and the hindering factors for a country to evaluate the move
- Prepare yourself to socialising as that is the best way to break barriers that could

naturally come up during the expatriation process.

- The world is a small village, explore it rather than be in one corner.
- Learn to approach people and do not always expect them to approach you first.
- Bonus incentives should be discussed with the expatriate prior to leaving for the assignment,
- Help the expatriates with information on travel clinics; renting a vehicle if one is not available immediately, help expatriates obtain a visa, etc. Do not leave everything in the hands of the person relocating; the MNE should assist consistently.
- Expatriates need exposure to the international business and legal systems that are applicable in the host countries; equally the financial complexities of cross-currency trading and foreign exchange controls needs to be considered and additional training where necessary should be given. On going development and training should be given so that the expatriate, when returning, is up to date on where the company is at that point in time. Development should be looked at also in the context of the host country and its trading requirements.
- Expatriates and their spouses should be allowed home leave and assistance to achieve this twice a year. Many things crop up and need attention and it is insufficient to attend to once a year.
- If you are going to a politically unstable area, information such as location of “friendly” embassies, evacuation procedures, contact people in case of political or military instability and others.
- Guidance on how much currency will be required to purchase the same type (functional and quality wise) of household goods as is prevalent in the home country
- Expatriates should be provided with assistance with the importation of firearms, pets, vehicles and other personal objects that require additional documentation by customs of that country but which are non-work related.
- Should be provided with a list of restaurants that cater for the expatriated dietary requirements

- As an expatriate you miss out on the training provided to your colleagues in your home country, so you are at a disadvantage when you return.
- Conversion to local drivers licence paid for, including compulsory driving lessons.
- MNEs should make sure that the expatriate, upon arriving, has the necessary tools - getting to work, training, hardware etc. - before the person reports for work.
- Immediate provision of transport rather than leaving the employee to sort this out.
- The documentation requirements of the country, i.e. work permits/residence visas, what is required, what the country normally provides and a plan for when visas expire, how to go about getting visas renewed.
- Advise on medical issues – doctors/dentists/hospitals, what to do in an emergency in the country. Inoculations required before arrival. Threats of disease in the country and how to avoid them. No guidance or information on malaria was given.
- Persistent problems regarding water, electricity, the MNE should provide a guide on what the company is responsible for and what the expatriate is personally responsible for.
- Local currency should be provided prior to arrival, sufficient for transport and supplies for the entire family for a period of one week.
- Home leave should be changed to international leave. The expatriate may wish to visit another destination.
- Firm should assist managers to fit in fast by identifying their challenges prior to arrival, helping solve the problem easier.
- Should be given a map of the vicinity as well as information regarding residence close to company offices.

5.4 Summary

There were 20 expatriates who responded to the research. Of these the majority (75 percent) were male.

The research findings have indicated that these expatriates are not getting adequate training from the MNEs that they work for, and it has also been determined that those expatriates with a trailing spouse and children have special needs in terms of preparation, support and training that they require for their trailing spouses and children.

The next chapter will provide an in-depth discussion of the research findings as well as recommendations to MNEs on how to better train their expatriates.

CHAPTER 6: CONCLUSIONS AND RECOMMENDATIONS

6.1 Introduction

According to Cooper & Schindler (2003:665), the summary is a brief statement of the essential findings. Findings state the facts; conclusions represent inferences drawn from the findings. Recommendations, on the other hand, are usually a few ideas about corrective actions. In academic research, the recommendations are often suggestions for further study that would broaden or test understanding of the subject area. In applied research the recommendations will usually be for managerial action rather than action research.

This chapter commences with a short overview of the study, after which a brief discussion of the most important research findings will be presented. Finally, the chapter will conclude with recommendations based on the research findings as well as the identification of future research topics that were identified while undertaking this research.

6.2 Literature Review

Chapter 1 provided the introduction and problem statement to the research. It was shown that the failure of expatriates was a major problem worldwide with failure rates in the USA as high as 70%. In the problem statement it was postulated that through proper orientation and cross cultural training for expatriates their failure rate – early termination of an assignment – could be reduced. Chapter 1 further identified the hypothesis that was tested in this research, which focused on determining whether expatriates were receiving adequate orientation and cross cultural training for the expatriate. The research attempted to identify if cross cultural training impacted on the successfulness of the expatriates assignment.

Chapter 2 was the first of two literature chapters. It provided an overview on the literature available on the orientation process; assignment failure and cross cultural training and its impact on cross cultural adaptation.

Chapter 3 concentrated on literature review pertaining to the selection of cross cultural training methods.

Lastly chapter 4 explained the methodology used in the research, while chapter 5 presented and discussed the findings of the research.

This section ties up all the loose ends that were raised in the research

As is well-known, an increasing number of firms are conducting business globally, seeking to multiply benefits by exploring opportunities worldwide. It is widely recognized that utilizing expatriate employees effectively on international assignments is a critical factor in enterprises succeeding in their global projects. On average, international organizations spend over two and a half times more to place an employee on an expatriate assignment than they would if they employed locally.

Adjustment generally refers to the changes which individuals actively engender or passively accept in order to achieve or maintain satisfactory states within themselves. In the same way, cross-cultural adjustment also can be regarded as the degree of comfort, familiarity, and ease that the individual feels toward new surroundings. The majority of expatriates who return prematurely, that is, return expatriates before the completion of their overseas assignment, do so for several reasons such as poor performance, job dissatisfaction, cultural shock and family dissatisfaction.

The non-completion of an international assignment by an expatriate necessitates replacement with a new expatriate. Consequently, expatriate failure is costly and results in a crisis for the multinational corporation. And while the direct costs of expatriate failure are calculated in monetary terms, the indirect costs of these failures, such as their

implications for future career prospects, are often concealed. Furthermore, they tend to be more damaging, and the consequences underestimated by both expatriates and international enterprises.

Due to the relatively high frequency of expatriate turnover and the related direct and indirect costs, international business literature has highlighted efforts to isolate the factors causing difficulty in cross-cultural adjustment.

Individual factors may result in expatriates having dissimilar cross-cultural adjustment experiences owing to the different emotional states and reactions, and the different things they may learn from the experience. The correlation between cross-cultural training and cross-cultural adjustment was significant in this study.

Cross-cultural training appears to be an important factor in the adjustment of expatriates. Nevertheless, the statistical results revealed that MNEs often neglect to provide any kind of cross-cultural training for their international expatriates. In review, the high costs related to difficulties in expatriation such as adjustment difficulties, premature returns, repatriation difficulties and career management problems, are also widely noticed. From this standpoint it is stressed that the training of employees for their international careers is a very important HRM challenge.

Normally, different countries have different climates, cultures, customs and dissimilar barriers. Consequently, international organizations should offer expatriates cross-cultural training relevant to expatriate needs and the overseas location. In fact, most cross-cultural training for expatriates is generally superficial in degree, incomplete or non-existent.

Many researchers advocate the use of cross-cultural training (Berry et al. 1993; Black and Mendenhall 1990; Deshpande and Viswesvaran 1992; Gregersen and Black 1992; Hammer and Martin 1990; Naumann 1993; Oddou 1992). Extensive studies indicate that training is advantageous in reducing the perceived need of expatriates to adjust. In other words, a positive relationship existed between cross-cultural training and cross-cultural

adjustment (Befus 1988; Deshpande and Viswesvaran 1991; Earley 1987; Gudykunst et al. 1977; Latta 1999; Mitchell et al. 1972; Newbold et al. 1982; O'Brien, Fiedler and Hewett 1970; Salisbury 1971; Steinkalk and Taft 1979; Worchel and Mitchell 1972).

For international expatriates who are completely unfamiliar with the customs, cultures and work habits of the host nation, cross-cultural training may be a critical element in their effectiveness and success in their overseas assignments. Because cross-cultural training familiarizes expatriates with the new culture, it is predictable that expatriates would feel adaptable and familiar with the host culture more directly and effortlessly. Equally, owing to the subsequent cultural familiarity and advanced cross-cultural understanding on the part of the expatriates, cross-cultural training would lead to reduced anxiety and culture shock, and would thereby facilitate cross-cultural adjustment. In terms of adjustment, which is defined as effective interaction with host nationals, expatriates gain knowledge through cross-cultural training that enhances their self-efficacy, which enables expatriates to emulate behaviors that would result in effective interactions more efficiently than non-trained expatriates. Training should include pre-departure training, overseas on-the-job training, host cultural awareness training, and language programs. It is a norm, at least theoretically, for organizations to offer some sort of orientation to employees posted to international assignments. This, it is assumed, will assist the expatriates to deal with some important issues while working in the new surroundings.

The importance of such training in preparing the individuals for intercultural work assignments has become increasingly apparent. A comprehensive review of the literature demonstrated that there was strong evidence for a positive relationship between cross-cultural training and adjustment.

Numerous advantages can be gained through providing expatriates with cross-cultural training prior to departure for international assignments. Firstly, cross-cultural training can be explained as a method for conscious change from an automatic, home-culture mode to a culturally appropriate, adaptable, and acceptable mode. It also can be defined

as an aid to dealing with unexpected events or culture shock in a new culture. Thirdly, cross-cultural training can be described as a way of lessening the uncertainties of interactions with foreign co-workers and nationals. Lastly, cross-cultural training should be clarified as a system of increasing the ability of expatriates to manage the reduction of pressure and uncertainty in overseas environments, work performance and general living problems.

Underlining the complex nature of culture, even as international organizations try to equip employees mentally, it is not easy to develop the appropriate mental frame of reference for dealing with different cultures worldwide. A frame of reference in this sense includes a basic awareness of cultural differences, which exist between the 'home' culture and those with which people are doing, or would like to do business. In conclusion, the degree to which cross-cultural training is needed and is effective is a function of the degree to which the international assignee interacts with members of the host culture. In addition, empirical experiences of international enterprises and academic researches has exposed that cross-cultural training is an imperative factor in facilitating the cross-cultural adjustment process.

6.3 Recommendations

The research has found that the age of the expatriate, the location of the assignment and the duration of the assignment do not significantly influence the preparation, support and training needs of the expatriate. In other words, expatriates should receive the same preparation, support and training regardless of the age of the expatriate, or the location or duration of the international assignment.

It was also determined that expatriates indicated that they did not receive the preparation, support and training they required for the international assignment. In the following section recommendations will be made based on the candidates responses regarding preparation, support and training.

6.3.1 Preparation

In preparing for an international assignment it is recommended that prior to the assignment the expatriate and his or her spouse should be allowed to visit the host country for an orientation visit at the MNE's expense. It will also be helpful to put the expatriates in touch with expatriates who have already made the move to the host country in order for them to get a more realistic idea of what to expect of the new location. In doing this the expatriates can bring their expectations of the new location closer to reality and as a result experience less culture shock in the international assignment.

As transport can be a problem to expatriates, especially in less developed countries, expatriates would prefer that the MNE pay for the shipment of their personal automobiles to and from the host country. If, however, this cannot be provided, the MNE should reimburse the expatriate for any losses incurred due to the sale or early lease cancellation of an automobile prior to the relocation. The expatriate does not want to be worse off by accepting the assignment than they would have been had they not accepted it. This is also the case with the primary residence of the expatriate in the home country. The MNE should assist expatriates with the lease or sale of a primary residence prior to the relocation, and if they should incur any losses due to the sale of their primary residence prior to the relocation, the MNE should reimburse the losses.

As most of the host locations are foreign to the expatriates and could be dangerous, the MNE should provide expatriates with legal assistance in order to make or update their will prior to the departure. Expatriates will also be receiving allowances and bonuses, all of which will have a tax implication; for this reason the MNE should provide expatriates with tax consultation services. Again the expatriate would want to make sure that accepting an international assignment does not place them in a worse position than before.

As medical facilities in the new location may not be on par with those which were available in the home country, the MNE should ensure that the expatriates and their families have a full physical and dental examination before leaving the home country. In

doing so any problems will be picked up prior to the assignment and can either be sorted out before departure, or if the health problem is picked up that might lead to the early termination of the assignment, the expatriate can be replaced with another. This will save the MNE the costs of premature termination due to ill health.

Finally in preparing the expatriate for the international assignment, the MNE should provide the expatriates with reading material such as newspapers from the host country in order to better prepare them for the new location. Surfing the internet is not sufficient; newspapers, for example, contain small stories and advertisements of the local butcher and corner store that will provide the expatriate with a much better impression of the new location and its people.

6.3.2 Support

Upon arrival in the host country the expatriate and his or her family should be taken on a tour of the area where they will be working and living. The MNE should assist the expatriate with tasks such as opening a bank account and obtaining a drivers licence.

In order to allow the expatriate to settle in as soon as possible the MNE should provide him or her with a one-time relocation allowance to pay for miscellaneous costs associated with the relocation, as well as providing a furniture and/or household allowance where shipping or rental of such items is impractical.

Health care is proving to be a major concern to expatriates on international assignments. In order to assist the expatriates in this regard the MNE should ensure that expatriates are provided with the same quality of medical aid cover as they received in the home country. If acceptable medical aid cover for employees on international assignments cannot be obtained in the host or home country, the MNE should investigate the world market for medical aid cover tailor made to expatriates. Upon arrival in the host country the MNE should also provide the expatriate with a list of reputable doctors and dentists in

the immediate vicinity. If the MNE put the expatriates in touch with expatriates who had already made the move to the host country prior to the relocation, expatriates would be able to determine for themselves which of these doctors and dentists were being used by other expatriates and would be getting a first-hand reference to a doctor or dentist. This process would be made a lot easier should the MNE assist expatriates in establishing clubs or social organisations in the host country. The expatriates currently on an assignment in the host country could serve as support networks for new expatriates prior to their relocation, upon arrival during the assignment.

MNE's should also pay for expatriates to join clubs such as golf clubs, gyms and others. As indicated earlier, the sooner the expatriate can settle into a normal routine similar to what they would have had in the home country, the sooner will they become productive and adapt to the new culture. These club memberships will also allow the expatriate to make business connections and form new friendships to help them adapt to the new location more quickly.

Because the expatriates are far from the family while on an international assignment, the MNE should provide round-trip aeroplane tickets for them and their families in case of illness or death in their family.

Lastly, the MNE should provide expatriates with temporary accommodation if they cannot move into their own home immediately upon repatriation. The MNE should also provide expatriates with once-off settlement allowances to compensate for additional expenses incurred upon return.

6.3.3 Training

As security is becoming a major concern all over the world with incidents such as terrorist attacks on the World Trade Centre in New York City and the bomb attacks on the London Underground, expatriates are requiring MNEs to provide them with security awareness briefing on the host location prior to and during the assignment. If the

expatriates are going to a politically unstable area, information such as the location of “friendly” embassies, evacuation procedures and a contact person in the case of political or military instability should be provided. Information relating to the stability/instability of neighbouring countries and how this may or may not affect the expatriates should also be provided.

Expatriates and their families should also be provided with information on local driving practices and motor vehicle safety in the host country. The expatriate should also be provided with an overview of the basic requirements for doing business in the host country. The more different the host country is to the home country, the more intense the training should be. Information such as the host countries’ perceptions on time and differing leadership styles as well as acceptable and unacceptable topics of conversation during meetings and social events should be provided to expatriates.

When providing cross-cultural training on the new location it is advised to start with objective characteristics of the host culture, such as currency, language, government systems and architecture. These characteristics are more easily observable and understandable. The focus can next shift to the more subjective characteristics of culture, such as customs, values and beliefs. Cross-cultural training is best offered by individuals who have spent time in the host country and know and understand the culture very well. Using expatriates who have spent a considerable amount of time in the host location can ensure that the new expatriate gains first-hand knowledge from someone who has successfully completed the assignment. This will also make the returning expatriates feel wanted by sharing their knowledge with other employees, thus helping the repatriation process. It is, however, important that the returning expatriate offering the training should not harbour negative feelings toward the host country and the assignment, as this could negatively impact the new expatriates. If the language spoken in the host country differs from the languages spoken in the home country, the expatriate should be provided with language training as well. As indicated earlier, the duration of the assignment as well as the intensity of the interaction between the expatriate and the host country

employees should be used as a guideline in determining the amount of cross-cultural training offered to the expatriate.

Lastly the expatriate and his or her spouse should attend a repatriation seminar to help them prepare mentally for the repatriation. It is often thought that the repatriation is no problem as the expatriate and spouse are returning to their home country, but a lot can change in the home country and headquarters in the years that they have been away; friends have moved away, colleagues have been promoted or moved on to other enterprises, and so forth.

6.4 Future Research

Firstly, the selection of expatriates for international assignments needs to be researched further. As indicated in the literature, expatriates are often selected on the grounds of their domestic performance, but it is not enough to ensure the successful completion of an international assignment.

A second factor that needs more research is the topic of the expatriate compensation. Research and recommendations on the best compensation practice need to be carried out.

A third topic of research is that of repatriation. The success of an international assignment cannot be measured on whether the expatriate stayed the full duration of the assignment alone. The expatriates should be retained for the MNE to use and share skills and knowledge they have picked up in the host country with other employees. If an expatriate leaves the employment of the MNE shortly after repatriation, this is still a failure for the MNE. The MNE invested a substantial amount of money in the expatriate through the international assignment, and by leaving the expatriate is now using the new-found skills and knowledge to improve the competitive position of another MNE. As a result the topic of repatriation of expatriates should receive attention.

A fourth topic of research is the topic of preparing the host country employees for the arrival of the expatriate. Almost all literature concentrates on preparing the expatriate for the assignment and limited literature is available regarding sensitizing the host country employees to the expatriates arrival. This is even more crucial if the expatriate is to occupy an executive position with extreme interaction with the host country employees.

A fifth topic of research is that of hosting a South African expatriate website. This website should contain all the information pertinent to an expatriate assigned to a South African MNE.

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ANNEXURE 1 :QUESTIONNAIRE ON CROSS CULTURAL TRAINING

1. AGE: _____

2. GENDER: _____

3. NATIONALITY: _____

4. NATION/REGION OF YOUR ASSIGNMENT: _____

5. MARITAL STATUS

- Married with child(ren)
- Married with no children
- Single
- Divorced

6. LENGTH OF EXPAT TENURE

- More than 4 years
- Two to Four years
- One to Two years
- Less than One year

7. LEVEL OF FOREIGN LANGUAGE FLUENCY

- FLUENT: comfortable with reading, writing, speaking and listening in the foreign language
- SOMEWHAT FLUENT: generally comfortable communicating in the foreign language
- GENERALLY ABLE TO COMMUNICATE: but with effort and the assistance of communication aids
- SOMEWHAT ABLE TO COMMUNICATE: but having difficulty speaking or listening in the foreign language
- WEAK: strongly reliant on communication aids.

8. LEVEL OF FORMAL CROSS-CULTURAL EXPERIENCE BEFORE THIS ASSIGNMENT

- At least 2years of overseas living/working experience
- At least 1 year of overseas living/working experience
- Lived/worked abroad for at least a 3-4 week period of time
- no prior overseas experience at all

9. HAVE YOU RECEIVED CROSS-CULTURAL TRAINING BEFORE YOUR EXPAT ASSIGNMENT?

- Yes
- No

10. HOW LONG AGO DID U RECEIVE YOUR MOST RECENT CROSS-CULTURAL TRAINING?

- At least 3 months ago
- At least 6 months ago
- At least 1 year ago
- At least 2 years ago
- N/A

11. OVERALL, DO YOU THINK THE KNOWLEDGE YOU LEARNED FROM THE CROSS-CULTURAL TRAINING HELPS YOU PERFORM YOUR EXPAT JOB?

- Most helpful
- Somewhat helpful
- Very helpful
- extremely helpful
- N/A

12. HOW MUCH OF THE KNOWLEDGE YOU LEARNED FROM THE CROSS CULTURAL TRAINING HAVE YOU USED TO PERFORM OUR EXPATRIATE JOB?

- Never used
- Occasionally used
- Frequently used
- Routinely used
- N/A

13. WHICH DO YOU FEEL IS MORE IMPORTANT CHARACTERISTIC FOR AN EXPAT MANAGER TO HAVE
EMOTIONAL INTELLIGENCE

- SELF-AWARENESS: ability to recognize one's own emotions, moods, and reactions
- SELF-REGULATION: one's intuitive ability to control or express emotions, suspend judgment, and deal with ambiguity
- SELF-MOTIVATION: one's resilience and ability to persevere despite obstacles
- EMPATHY: one's ability to place oneself in another's shoes and understand differences in values and perspectives
- SOCIAL SKILL: one's ability to build relationships by seeking commonalities and friendships regardless of differences

13. TECHNICAL PROBLEM-SOLVING SKILLS AND KNOWLEDGE

14. WHAT, IN YOUR OPINION, IS THE MAIN REASON FOR EXPATRIATE FAILURE?

- Inability of manager's spouse to adjust to the new environment
- The manager's inability to adapt to the new environment
- Other family related issues
- The manager's personality or emotional maturity
- The manager's inability to cope with responsibilities associated with the overseas work
- The manager's lack of technical competence

1. WHAT WERE THE KEY CHALLENGES YOU FACED DURING EACH OVERSEAS ASSIGNMENT?

2. WHAT WERE THE CULTURAL DIFFERENCES THAT YOU FOUND MOST CHALLENGING?

3. WHICH PERSONAL STRENGTHS DID YOU FIND MOST HELPFUL DURING YOUR OVERSEAS ASSIGNMENT?

4. WHAT TYPE OF TRAINING (OR OTHER TYPES OF SUPPORT) DID YOU RECEIVE FROM YOUR FIRM?

5. WHAT ARE YOUR RECOMMENDATIONS FOR FUTURE PREPARATION OF
EXPATRIATE MANAGERS?

COMMENTS:



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16 APRIL 2007

MRS. N PILLAY (951059116)
GRADUATE SCHOOL OF BUSINESS

Dear Mrs. Pillay

ETHICAL CLEARANCE APPROVAL NUMBER: HSS/0164/07M

I wish to confirm that ethical clearance has been granted for the following project:

"A study on the effectiveness of the orientatlon process and cross-cultural training for the expatriate"

Yours faithfully


MS. PHUMELELE KIMBA
RESEARCH OFFICE

cc: Faculty Officer (Christel Haddon)
→ Dr. Supervisor (Dr. M Phin)