

UNIVERSITY OF KWAZULU-NATAL

**EXPATRIATE ACADEMICS AND EXPATRIATE MANAGEMENT IN
A SOUTH AFRICAN HIGHER EDUCATION INSTITUTION**

By

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DECLARATION

I, Ashika Maharaj declare that

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DEDICATION

I would like to dedicate this dissertation to my late father, Bob Maharaj and my mum, Vish. Without their foresight, guidance and support I would never have had the solid foundation upon which to build the strength, courage and determination I have today.

ABSTRACT

The main aim of the study is to examine the staffing trends of academics in SA higher education in order to compare South African academics to expatriate academics. A secondary aim of the study is to examine the international career experience of expatriate academics at University of KwaZulu-Natal (UKZN) from the perspective of expatriate academics concerning their reasons for relocating to South Africa as well as their experience of organisational and social support as well as from the perspective of organisational stakeholders, namely their academic line managers and human resource (HR) specialists at UKZN.

Currently, SA is facing major skills and staffing shortages in terms of Science, Engineering and Agriculture. The Department of Higher Education and Training (DOHET) has provided funding to source international talent to allow SA universities to run programmes in scarce skills disciplines to create 'home grown' talent to overcome the staff and skills shortages. This type of international talent remains a largely under-researched group, as they have been labelled 'self-initiated expatriates (SIEs)'. Many academics embark on international mobility in order to develop their careers and to improve their marketability and employability, therefore are part of this group and are called expatriate academics. The problem comes in when universities do not have formal policies in place to manage their international talent so as to retain this valuable human resource, they are managed no differently than their local colleagues despite facing a myriad of challenges in the form of general, work and interaction adjustment (Black and Gregersen, 1999). By examining expatriate academics experiences at UKZN, the aim of the study is to create a programme especially designed to assist expatriate academics to successfully adjust to life at UKZN and their communities in KwaZulu-Natal.

This study has adopted a mixed methodology, using secondary data, quantitative and qualitative methods to extract the data required to examine expatriate academics in South African higher education and at UKZN. Firstly, an analysis of staffing trends in publically funded SA higher education institutions over the three years 2005/2010/2012 was conducted during the secondary data collection phase of the current study. Secondly, a self-reporting questionnaire consisting of questions covering the reasons for relocation and actual experience of expatriation was administered to expatriate academics at UKZN. Furthermore, the questionnaire incorporated the "Protean and Boundaryless Career Attitude Scales"

(PBCA) which was developed by Briscoe, Hall and Demuth (2006:16). Thirdly, semi-structured interviews with academic line managers (heads of school, deans, discipline coordinators, supervisors) and HR specialists were conducted. This helped to provide the employer's perspective, which is useful as a way of situating the faculty, school, discipline and administration's viewpoint within the larger institution.

The results of the secondary data collection phase results revealed that there were no significant differences in age between SA and expatriate academics nationally over the three years. However, when examining the age of academics (SA and expatriate), it is clear to see that it is a truly heterogeneous group of individuals. However, at UKZN over the three years there have been more female SA academics employed. A comparison of the academic qualifications of SA and expatriate academics over the three years indicates that expatriate academics are more highly qualified than their SA colleagues, as the majority of the former hold a doctoral degree. The majority of expatriate academics are recruited from SADC countries as well as other African countries. Interestingly enough, the next most frequent major supply region of expatriate academics to South Africa is Europe. WITS and UCT were consistently ranked first and second in terms of the number of expatriate academics employed over the three years. Both are among the leading five higher education institutions in South Africa in terms of their research outputs as well as the number of PhDs per member of staff.

Secondly, an investigation into the motivation behind the expatriate academics' decision to relocate was carried out. These findings suggest that there is no one primary motivation but rather a variety of motives at any given life stage or career stage that may together motivate expatriate academics in general. The motive Career appeared to be dominant among the respondents in this study, closely followed by Adventure/Travel and then Financial.

Thirdly, the individual career experiences of expatriate academics in this study indicate that the majority are well adjusted in terms of their relationships with their host country colleagues and their relationships with family and friends back home as well as in terms of the fulfillment of their expectations regarding work. They did, however, indicate that their experience of organisational support could have been improved during their experience as well as during the pre-departure phase. Unlike previous studies, the results of this study indicate that expatriate academics do not share close ties with other expatriates or local South Africans in the university community or within the communities in which they lived.

Fourthly, expatriate academics had to deal with many challenges during their career experience here in South Africa. These have been discussed across three levels, macro- (administrative), meso- (work adjustment) and micro-level (family and lifestyle adjustment). This proves that SIEs face many challenges that hinder their ability to expatriate and have positive career experiences.

The PBCA scale was developed by Briscoe, Hall and Demuth (2006) and adapted for use in an academic setting. The results from the use of the scale in the current study indicate that respondents exhibit a protean career attitude which suggests that they are “able to develop a greater adaptability and self-awareness thereby ensuring a proactive smart employee” (Briscoe and Hall, 2006:16). These results confirm the results of the Expatriation Experience sub-scale in which it was found that the respondents were well adjusted to their work environment. The respondents in this study are best described ‘solid citizens’ in terms of the Career Profiles of Contemporary Career Agents (see Table 3.4) developed by Briscoe and Hall (2006).

Fifthly, the major opportunities, according to management, presented by having expatriate academics at UKZN include access to subject matter expertise, diversity and a wealth of knowledge and experience. These academics also bring with them valuable social capital in the form of resources like networks of contacts, collaborative research opportunities and innovative curriculum development. Above all else, they serve as the solution to the critical skills shortages South Africa is facing particularly in the fields of science, engineering and mathematics.

This study is a multi-disciplinary study, that is situated in a number of disciplines such as expatriate management, career management, migration as well as higher education studies. Therefore it adds to the existing body of knowledge by providing a multi-disciplinary approach to a concept that was previously exclusively dealt with in management studies in a business environment. This study is therefore unique as it highlights the perceptions of organisational support by expatriate academics to assess whether or not the organisation, in this case UKZN is doing enough to ensure the success of the international experience of expatriate academics.

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LIST OF ACRONYMS

South Africa	SA
University of KwaZulu-Natal	UKZN
Self-initiated expatriates	SIEs
Joint Initiative on Priority Skills acquisition	JIPSA
Accelerated and Shared Growth Initiative for South Africa	AgriSA
National Development Plan 2030	NDP
Department of Higher Education and Training	DOHET
Human resources	HR
United Kingdom	UK
United States	US
Southern African Regional Universities Association	SARUA
Southern African Development Community	SADC
Higher Education South Africa	HESA
Structural adjustment programmes	SAPs
National South African Student Financial Aid Scheme	NSFAS
Association for the Development of Education in Africa	ADEA
United Nations Educational, Scientific and Cultural Organisation	UNESCO
University of Cape Town	UCT
University of the Witwatersrand	WITS
SADC Qualification Framework	SADCQF
Further Education and Training Colleges	FET
Department of Labour	DOL
International Education Association of South Africa	IEASA
Education, Training and Development Sector Training Authority	ETDP SETA
Gross Domestic Product	GDP
World Bank Institute's Knowledge for Development	K4D
Information Communication Technology	ICT
International Human Resource Management	IHRM
Protean and Boundaryless Career Attitude Scale	PBCA
Higher Education Information Management System	HEMIS
Data Management Information System	DMI
Self-directed career management	SDCM
Values-driven	VD
Boundaryless Mindset	BM
Organisational Mobility Preference	OMP
Exploratory Factor analysis	EFA
Kaiser-Meyer-Olkin	KMO
Measure of Sampling Adequacy	MSA

Chapter 1

Introduction and Overview of the Study

1.1 Introduction

This study aims to explore the staffing trends in South African higher education, to identify the staff and skills shortages currently experienced. One of the ways to solve the problem in South Africa (SA) is to recruit expatriate academics to staff so-called scarce skills disciplines. This presents a growing opportunity for international mobility of expatriate academics into SA. In fact, recently more people are spending time away from their home countries for work purposes than ever before (Inkson and Myers, 2003; Dickmann and Baruch, 2011). This study, firstly, identifies the need for expatriate academics in SA higher education. Secondly, it identifies the disciplines and universities that recruit expatriate academics in SA. Furthermore, it compares the age, gender and qualifications of SA and expatriate academics in SA higher education in order to shed light on the critical need these valuable human resources are filling. In addition to the above mentioned focus areas of this study, it further investigates the motives of expatriate academics in order to identify their personal reasons for relocating to the University of KwaZulu-Natal (UKZN) and SA. Furthermore, an investigation of the career attitudes of expatriate academics at UKZN is conducted in order to identify how if at all this, impacts on their overall experience of expatriation.

Despite the challenges of adjusting to a new culture that one would expect from the overseas experience, it would be prudent to assume that an international career is for the most part an exciting option. Its attractiveness may lie in the apparent benefits for career advancement as the international experience augments the marketability of the employee in multinational companies, especially in more senior managerial positions (Inkson and Myers, 2003). However, deciding to take part in international mobility has repercussions that go further than one's objective career success that is and extends beyond benefits such as promotion and pay increases. Thomas, Lazarova and Inkson (2005:345) argue that "some people might recognise the limitations of an overseas assignment in terms of external career advancement, but choose to expatriate anyway in order to gain benefits in terms of personal development and growth".

Scholarly interest in expatriation and their management has created an vast body of literature and research. However, the emphasis has been on expatriates at managerial or executive level who are posted on international assignments by their employers. There is a scarcity of studies about expatriates working outside the business environment. South African expatriate literature has also concentrated mainly on the expatriation of highly skilled and knowledge workers from SA to destinations such as the United States (US), the United Kingdom (UK) and the United Arab Emirates (UAE) (Pieters, 2009). This study adds to the existing body of knowledge on expatriation in that it examines the reasons for expatriating to SA, rather than the reasons why citizens are expatriating out of SA.

After extensively reviewing of the associated literature, it seems like there is not only a paucity of studies on expatriates working in South African organisations but there is also a scarcity of research on expatriates working outside the business environment. These studies have adopted either a quantitative or qualitative methodology. This study adopts a mixed methods approach in order to analyse the expatriation phenomenon from different perspectives, namely an individual and a management perspective and in a different organisational setting, namely a university (UKZN) in SA.

Nevertheless, universities are also joining the global marketplace in searching for academic talent and there is an increase in the number of academics choosing to expatriate to other countries (Altbach, 2004; Leong and Leung, 2004; Richardson 2009; Al Ariss and Ozbilgin, 2010; Al Ariss, 2013). Expatriate academics choose to relocate of their own volition; therefore they are classified as ‘self-initiated expatriates’ (SIEs). Regardless of the increasing internationalisation and regionalisation of higher education in the world today, the research on expatriate academics remains on the periphery of management and higher education studies (Mamiseishvili and Rosser, 2010; Mamiseishvili, 2011). In order to fill that gap, the current study focuses on a group of expatriate academics currently working at UKZN.

In this chapter, the background to the problem, the focus of the study in terms of aims and objectives, the contribution of the study to scholarship, research methodology and design and overview of the thesis structure is presented.

1.2 Background to the problem

The problem defined in the introduction which has prompted this study influences expatriates across the globe where free-market business is the method of economic activity. While the

South African context reflects some of the international ideocyncracies and shares these problems, the particular local context will also be discussed in relation to the background to the problem.

1.2.1 Global background to the problem

Globalisation has seen an increase in the need for organisations to remain competitive, be it through the services and products they provide or the human resources they possess. In a bid to gain competitive advantage over their competitors, organisations are increasingly seeking to move their operations internationally to take advantage of cheaper or better quality resources. This has pre-empted the use of expatriates to staff these international operations. A 2011 report by the United Nations Department of Economic and Social Affairs estimated that “there were approximately 214 million people engaged in international mobility; this represented 3.1% of the total global population” (Dickmann and Baruch, 2011:139) and this number is expected to rise exponentially over the next decade.

Expatriates have been deployed for knowledge transfer, grooming internationally competent managers or for filling positions affected by skills shortages (Collings and Scullion, 2008). Expatriates are, however, not a homogenous group of individuals; there are traditional company-backed expatriates who go on international assignments because they have been posted there by their organisation as well as self-initiated expatriates (SIEs) who relocate to take up international posts of their own volition (free will). Even though there is growing interest in this particular group of expatriates, there is still a dearth of studies examining SIEs in expatriate management literature. Academia is another field of work that uses expatriates to achieve its organisational objectives. Increasingly, universities are seeking to attract highly skilled academics to their institutions to maintain or boost their competitive advantage in the global marketplace. Academics tend to be highly skilled individuals who know the value of their own employability and hence are able to make their own choices when it comes to international mobility.

1.2.2 Background to the problem: The South African context

Currently, South Africa is facing major skills and staffing shortages in terms of science, engineering and agriculture. The government has created a Scarce Skills List (Kotecha et al,

2014) that identifies key areas in industry that are facing critical staff and skills shortages; this applies to higher education as well. The SA government has put into place policies such as “JIPSA and the NDP 2030” (The Presidency, 2006) to overcome the challenges that together with HIV/AIDS have detracted from South Africa’s achieving its post-apartheid economic and social goals.

The Department of Higher Education and Training (DOHET) has put into place a number of initiatives to help alleviate the problem of staff and skills shortages. In the short term, DOHET has provided funding to source international talent to allow SA universities to run programmes in scarce skills disciplines to create ‘home grown’ talent to overcome the staff and skills shortages. SA universities have also sourced international talent to create a ‘cosmopolitan feel’ to the university in order to become truly international institutions of higher learning. The problem comes in when universities do not have formal policies in place to manage their international talent so as to retain this valuable human resource, they are managed no differently than their local colleagues despite facing a myriad of challenges in the form of general, work and interaction adjustment (Black and Gregersen, 1999). By examining expatriate academics experiences at UKZN, the aim of the study is to create a programme especially designed to assist expatriate academics to successfully adjust to life at UKZN and their communities in KwaZulu-Natal.

1.2.3 University of KwaZulu-Natal: A contextual background

“[The university] was formed on 1 January 2004 after the merger between the University of Natal and the University of Durban-Westville” (UKZN, 2014) following the new directives of the Higher Education Act that saw the merger of higher education institutions in SA into new institutions. The university based in KwaZulu-Natal on the east coast of SA has five campuses, each located in different geographical locations and some in different cities. The campuses house the different disciplines offered at the university; thus the disciplines that have the majority of expatriate academics will also be reflected as the campus that many of them are located.

“**Howard College** Campus is home to the following range of degree options in the fields of Science (including Geography and Environmental disciplines), Engineering, Law, Management Studies, Humanities (including Music) and Social Sciences (including Social Work, as well as Architecture and Nursing)” (UKZN, 2014).

“**Pietermaritzburg** Campus is located in the legislative capital of KwaZulu-Natal and accommodates the broad areas of Science and Agriculture, Education, Law, Human and Management Sciences. Unique to the Pietermaritzburg campus are the disciplines of Agriculture, Theology and Fine Art” (UKZN, 2014).

“**Westville** Campus is located in Durban, KwaZulu-Natal and currently offers programmes in Science, Engineering, Law, Commerce and Management, Humanities, Social Sciences and Health Sciences” (UKZN, 2014).

The “**Edgewood** campus in Pinetown KwaZulu-Natal is the University’s key site for teacher education and the home of the University’s School of Education”.

“**Medical School** campus is the University’s primary site for Medical Education and has been producing quality doctors for 54 years in Durban, KwaZulu-Natal”.

The College of **Engineering, Science and Agriculture** comprises the following Schools:

- School of Engineering
- School of Agriculture, Earth and Environmental Sciences
- School of Chemistry and Physics
- School of Life Sciences
- School Mathematics, Statistics and Computer Science.

It extends over three of the five campuses of the university, namely Howard College, Pietermaritzburg and Westville.

The “College of **Humanities** comprises of six diverse, yet complimentary schools which are located across three of the universities five campuses: Edgewood; Howard College and Pietermaritzburg. The College boasts 27 vibrant research, teaching and learning units, many of which are internationally recognised” (UKZN, 2014).

The six academic Schools in the College are:

- “The School of Applied Human Sciences
- The School of Arts
- The School of Built Environment and Development Studies
- The School of Education
- The School of Religion, Philosophy and Classics

- The School of Social Sciences”.

Thirdly, the College of **Law and Management Studies** comprises of four academic Schools:

- “Graduate School of Business and Leadership
- School of Accounting, Economics & Finance
- School of Law;
- School of Management, Information Technology & Governance”.

Lastly, the College of **Health Sciences** is spread across three of the five campuses of the University of KwaZulu-Natal. The College's four schools comprise:

- “Clinical Medicine
- Health Sciences
- Laboratory Medicine and Medical Sciences
- Nursing and Public Health”.

The university employs over 5500 staff members both academic and non-academic (support/administrative staff). UKZN is home to more than 20000 students. Both the staff and student body are made up of a diverse population with local and international students and staff from SADC countries, other African countries and international countries also. The Times Higher Education group in an effort to rank the universities in BRICS (Brazil, Russia, India, China and South Africa) ranked UKZN in forty-fifth position. The world-wide ranking scale is known as the *Quacquarelli Symonds* (QS) ranking for 2013/2014 ranked UKZN at 501-550 (MacFarlane, 2013; *Quacquarelli Symonds Limited*, 2014). Best Global University rankings (2014) placed UKZN at 417. Therefore, it is a world-class institution with a formidable research profile and a multitude of collaborative relationships with over 250 higher education and research institutions globally (UKZN, 2014).

1.3 Focus of the study

The main aim of the study is to examine the staffing trends of academics in SA higher education in order to analyse SA academics in relation to expatriate academics. Furthermore, expatriate academics’ reasons for relocating to SA are analysed, as well as their experience of organisational and social support during their career experience at UKZN. A secondary aim of the study is to evaluate the international career experience of expatriate academics at

UKZN from the perspective of organisational stakeholders, that is, their academic line managers and HR specialists at UKZN. In order to explore the phenomenon, the following aims have been established:

Aim 1: To investigate the staffing trends amongst academics at South African Higher education institutions over three years 2005/2010/2012

Aim 2: To explore the nature of the international career experiences amongst expatriate academics at UKZN

Aim 3: To evaluate the nature of the international career experience from the perspective of organisational stakeholders at UKZN

1.4 Conceptual framework

As this study is multidisciplinary in nature, it was difficult to find a particular theory upon which to base the study. Therefore it was considered wiser to use a conceptual framework to link empirical data to abstract concepts. Rudestam and Newton (2015:6) consider this to be “a less developed form of theory”.

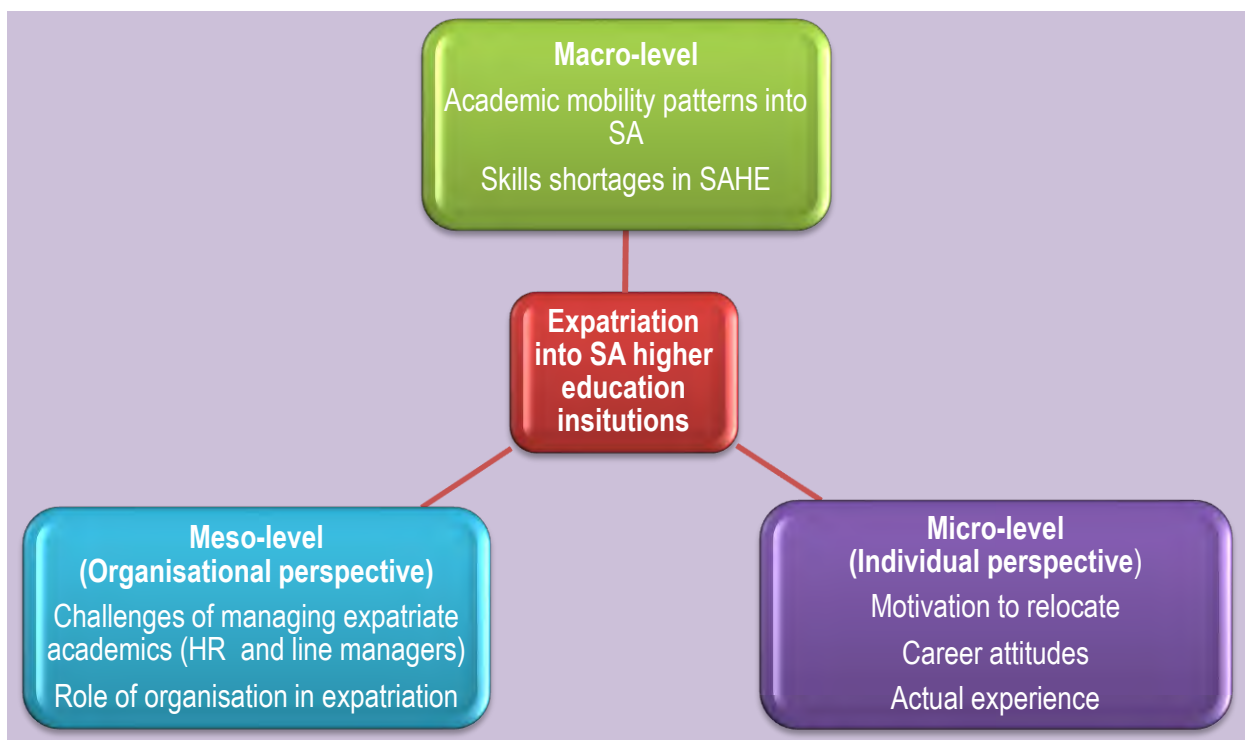


Figure 1-1 Conceptual framework of this study

This conceptual framework depicted in Figure 1-1, served as the starting point for the

development of the research and is what has been extended, qualified and explored in this study.

As the research intended to explore the relatively unknown area of expatriate academics in South African higher education, the researcher felt that an exploration of different levels of analysis should be undertaken, that is the macro-level, the meso-level and the micro-level (See Figure 1-1). At the macro-level the intention was to provide a holistic overview of the current situation in SA higher education institutions. The intention was to identify the main supply regions of expatriate academics into SA higher education institutions as well as to categorise the higher education institutions that are the main recipients of these academics. A further intention was to identify the disciplines where skills shortages occurred in terms of suitably qualified staff.

At the meso-level, a more in-depth study of the study site, namely UKZN, was intended. Here the disciplines that house the majority of expatriate academics would be identified to evaluate if expatriate academics were in fact being recruited to solve the skills crisis. The researcher also wanted to analyse the role the university played in the overall expatriation experience of the academics coming into UKZN. Therefore, it was decided to interview HR specialists for this purpose. Next, it was decided that line managers of expatriate academics would be interviewed so as to explore the challenges and opportunities they perceived by having expatriate academics in their disciplines.

At the micro-level, it was planned to evaluate the individual expatriate academics in terms of their motivation to relocate, their career attitudes and their actual expatriation experience at UKZN. This was so as to evaluate the current context and to provide recommendations to management on how to improve the situation so as to retain the scarce human capital that expatriate academics represent.

1.5 Research objectives of the study

The research objectives below were developed in order to thoroughly explore the aims of this study:

1. To investigate the demographic profile (age/gender/qualification/country of origin) of expatriate academics in South African higher education institutions over three years (2005/2010/2012)

2. To categorise the ranking of South African higher education institutions in terms of the number of expatriate academics employed and their countries of origin over three years (2005/2010/2012)
3. To compare and contrast South African academics with expatriate academics in terms of qualifications, age and gender over three years (2005/2010/2012)
4. To compare and contrast South African with expatriate academic staff at UKZN in terms of age, gender, qualification, field of study and level of academic post for 2005/2010/2012
5. To determine the motivating factors that led to the decision to relocate among expatriate academics at UKZN
6. To investigate expatriate academics experiences of organisational and social support during expatriation at UKZN
7. To evaluate the career orientation of expatriate academics at UKZN
8. To determine whether demographic factors such as age, gender, location of expatriate academic's family, years of experience as an academic, duration of expatriation experience and field of study influence expatriate academic's motivation to expatriate, international career experience and career orientation at UKZN
9. To explore whether there is a relationship between expatriate academic's motivation to expatriate and their international career experience, their motivation to expatriate and career orientation and between their international career experience and career orientation at UKZN
10. To examine the challenges and opportunities associated with the management of expatriate academics as perceived by their academic line managers
11. To investigate the nature of the expatriation experience of expatriate academics from the perspective of HR specialists

Table 1.1 below illustrates how the different phases of the study combine the research aims and objectives.

Table 1-1 The design of the study

	PHASE 1 Secondary data collection	PHASE 2 Quantitative study	PHASE 3 Qualitative study
Aim	1	2	3
Research Objectives	1, 2, 3, 4	5, 6, 7, 8, 9	10,11
Information source	Records and reports	Expatriate academics at UKZN	Academic line managers and HR specialists at UKZN
Data Collection Method	Data retrieval : HEMIS	Self-designed questionnaire	Interviews
Data Analysis	Statistical analysis	Statistical analysis	Thematic analysis

1.6 Contribution of the study

While there is an increased interest in management studies, there remains little actual research into different types of expatriation in different organisational contexts. There is an excess of mainstream literature on expatriate management, migration studies and immigrants; yet empirical research into self-initiated expatriation (SIEs) in the management discipline remains limited, despite growing numbers in the global workforce. The aim of this study was to add to the discourse of how organisations can better manage SIEs to ensure that from a managerial perspective they are doing their best to ensure a positive career experience, thereby securing the retention of global talent.

This study aimed to add to the existing scholarship concerning the experiences of expatriates by exploring a different organisational setting, a university environment with its own unique challenges in terms of teaching, research and supervision. This study aimed to add to the existing discourse by building new knowledge concerning a particular group of SIEs, namely, expatriate academics and their experiences of organisational and social support.

These two factors have been identified in the literature as critical factors that ensure efficient adjustment to the new work environment. As this research aimed to contribute to the existing body of knowledge on expatriate management and on how to effectively manage expatriates in a different organisational setting, examining the perceptions of expatriate academics regarding these factors as well as examining the experience of expatriate academics at UKZN from the perspective of organisational stakeholders allows the researcher to create a model that will enable the improvement of the international career experience for both parties concerned.

Previous studies on expatriation have examined the phenomenon either from an organisational or an individual perspective. This study is unique in that it contributes to the existing body of scholarship by providing a mixed methods approach to exploring the expatriation experience. By using a questionnaire to elicit responses from the academics themselves, this study also answers the call amongst researchers to examine the motives and experiences of expatriates using a quantitative methodology in order to provide empirical evidence (facts and figures) in an otherwise qualitative field. By examining expatriation from a management perspective using interviews, this study also contributes to the existing body of knowledge concerning expatriate management using a qualitative methodology; it also aims

to examine how to improve the experience for expatriates by examining the role of the organisation in ensuring the success of the expatriation experience for individuals.

Empirical research on SIEs tends to focus on “international career behaviours, career strategies in SIE, adjustment of SIEs and repatriates to their countries, motivations for relocation, relationship of job satisfaction and turnover intentions, boundaryless career experiences, role of HR in supporting SIEs, demographic profiles of SIEs, role of gender and career patterns” (Al-Ariss and Crowley-Henry, 2013:81). Though there has been consistent development of research and academic works on SIEs in management, it remains poorly researched and theorised in comparison to the vast body of literature on traditional expatriates. There has been a call for more empirical research concerning the motives for relocation and experiences of SIEs (Richardson, 2002; Thorn, 2009; Froese, 2009) during relocation, and thus this is one of the aims of this study.

This research aims to add to the current scholarship on the mobility of the highly skilled in migration literature by examining the international career experience of SIE’s from an individual perspective across all levels of academia, thus focusing not only on the ‘elite’ whereas other studies have focused exclusively on those in the corporate world in management or leadership positions.

Furthermore, the studies on SIEs have been predominantly focused on participants from Europe, followed by those from the United Kingdom (UK), and other Western countries who have had very little resistance to their freedom of movement and whose careers have thus been termed ‘boundaryless’. This study also questions the suitability of the premise that SIEs have ‘boundaryless careers, that is, they are able to cross boundaries, both international and organisational, freely with very little resistance. Africa is very different to other regions globally in that there is very little regional co-operation in terms of political and socio-economic integration. Countries are politically and socially unstable and there are a multitude of restrictions on the freedom of movement on the continent, in the form of visas, work permits and immigration laws. This study contributes to this body of knowledge by providing empirical evidence of the motives and experiences of SIEs from predominantly African countries in SA.

This study aims to explore if the career experiences of SIEs coming into SA can be termed ‘boundaryless’ or whether these individuals are subjected to a variety of challenges at macro-, meso- and micro-levels that shape their international career experiences in SA. Thus by

using migration literature to explore the experiences of expatriate academics in SA, in terms of the challenges they face in their quest to have an international career experience here, this study makes a unique contribution to the existing scholarship on expatriates. As research conducted in South Africa, another noteworthy contribution of this research is to analyze the local dynamics of the situation in order to deal with a problem that is both international and local in significance. Another contribution of this study is that, as it is conducted within the researcher's own country (SA), it can be seen as a means of restoring the gap in our understanding of developed and developing countries. By augmenting the current scholarship, this research study intends to facilitate the relevance of theories of talent management practices to managing SIEs who are highly educated and highly skilled individuals, and therefore fit the profile of being 'talented'. The result of this would be to facilitate integration and adjustment of expatriates at UKZN.

Traditionally, "migration studies have primarily focused on mobility patterns tracking the migration of highly skilled individuals from the Africa to Western countries such as the United States (US), UK and Europe" (Pieters, 2009: 36). 'Brain drain' from African countries has focused on the south to north dichotomy. Very few studies have examined the migration of highly skilled individuals from north to south; therefore this study contributes to the discourse on migration patterns by exploring the academic mobility patterns of a particular group of highly skilled individuals, that is, expatriate academics coming into South Africa (SA) from African countries, Europe, Asia and the Americas, therefore, the north-south dichotomy. The study further contributes to this existing body of knowledge by examining the motives for relocation amongst academics from a personal perspective, unlike other studies in migration discourse that have focused on migration from a purely macro-level.

1.7 Research methodology and design

This study adopts a mixed-method research design that includes secondary data collection, a self-administered questionnaire and personal interviews. More specifically, it could be described as a 'complementary design' (Greene, Caracelli and Graham, 1989:257), "the term 'complementary' assisting in the clarification of the use of both forms of methodology, where both quantitative and qualitative methods are used to measure or describe overlapping but also different facets of a phenomenon".

In order to meet the specific aims listed in 1.3, the study will consist of three phases, each of which is designed around the specific aims:

PHASE 1: Secondary data audit (covering Aim 1)

Analysis of staffing trends in publically funded SA higher education institutions over the three years 2005/2010/2012 was conducted during the data collection phase of the current study. Demographic information such as age, gender, qualifications and country of origin was used to define the staffing trends in SA higher education.

PHASE 2: Quantitative study (covering Aim 2)

A self-reporting questionnaire consisting of questions covering Aim 2 was designed. Included in this questionnaire is a section on demographic data. Sub-scales covering the reasons for relocation and actual experience of expatriation were included. Furthermore, the questionnaire incorporates the “Protean and Boundaryless Career Attitude Scales” (PBCA) which was developed by Briscoe, Hall and Demuth (2006:16) (refer to Appendix F).

PHASE 3: Qualitative study (covering Aim 3)

Semi-structured interviews with academic line managers (heads of school, deans, discipline co-ordinators, supervisors) are to be conducted. Interviewing managers of expatriate academics help to provide the employer’s perspective, which is useful as a way of situating the faculty, school, discipline and administration’s viewpoint within the larger institution. These interviews also serve as a form of enquiry into the circumstances of the group of expatriate academics on campus. The semi-structured interviews focus on the HR specialists of the university, that is, those responsible for the recruitment and selection of these foreign candidates as well as those directly responsible for the retention of these valuable resources.

1.8 Clarification of concepts

In order to better understand the terminology used throughout the study, the following key concepts are briefly described:

Academics: Professionals engaged in teaching, research and supervision activities in a university setting.

Career: A career is “often composed of the jobs held, titles earned and work accomplished over a long period of time, rather than just referring to one position” (Arthur and Rousseau, 1996:34).

Expatriates: Individuals who are sent on an overseas assignment by their firms (Inkson and Myers, 2003)

Expatriate academics: These are academics that have chosen to relocate in order to work and live in another country.

Motivation: Extrinsic (promotions, better salaries and benefits) and intrinsic factors (job commitment, satisfaction, engagement) that “stimulate desire and energy in people to be continually interested and committed to a job/role or subject, or to make an effort to attain a goal” (Aktar, 2010:646).

Macro-level influences: Factors that can affect the international career experience of academics, akin to a PEST analysis (political/social/economic/technological)

Meso-Level Influences: These are factors within an organisation (organisational culture/policies and practices) and society (xenophobia/professional jealousy) that affect the international career experience of academics.

Micro-level Influences: These are personal factors that can affect the international career experience of academics such as interpersonal relationships between staff and students, community engagement, family matters, acclimatisation to the new work and living environment.

Professionals: Individuals who have undergone formal training in the form of academic and work related qualifications in order to practice in their field of practice

Self-initiated expatriates (SIEs): Individuals who seek out international job opportunities of their own free will (Howe-Walsh and Schyns, 2010)

In the next section an overview of the structure of the thesis is provided.

1.9 Overview of thesis structure

Chapter 1	<p>Introduction and overview of study</p> <p>This chapter introduces the aim and purpose of the study and provides the background to the research problem and motivates the significance of the research.</p>
Chapter 2	<p>Academic mobility in the Higher education context</p> <p>This chapter focuses on the background to this study, namely global mobility patterns and the challenges facing higher education in the Southern African region. It also provides an insight into skills and staff shortages in South Africa.</p>
Chapter 3	<p>Expatriate and Self-initiated Expatriate management literature</p> <p>This chapter focuses on the respondents in this study, namely SIEs. Here the difference between SIEs and traditional expatriates is explored, existing literature on SIEs as well as expatriate academics as part of this group are reviewed. The motives for expatriation as well as the experience of expatriation from the individual's perspective are explored. Strategies used to manage expatriates from an HR perspective are also reviewed.</p>
Chapter 4	<p>Careers of Self-initiated expatriates</p> <p>This chapter focuses on contemporary career orientations such as the Protean and Boundaryless career orientations. Here the importance of exhibiting a contemporary career orientation to SIEs is explored. Also the importance of this kind of career orientation to the overall success of an international career experience is discussed.</p>
Chapter 5	<p>Research methodology and design</p> <p>This chapter outlines the research method adopted for the study in addressing the research objectives.</p>
Chapter 6	<p>Phase 1: Secondary data collection</p> <p>This chapter presents the results of the secondary data collection phase of the study covering Aim 1, research objectives 1-4 of this study. Here the comparison between SA and expatriate academics in terms of age, gender, and qualification across the 23 public higher education institutions is presented. Also, a comparison of SA and expatriate academics at UKZN in terms of age, gender, qualification, level of post and field of study is presented</p>
Chapter 7	<p>Phase 2: Quantitative research</p> <p>This chapter presents the results of the quantitative phase covering Aim 2, research objectives 5-9 of the study. Here the results of the self-designed questionnaire administered to respondents, that is expatriate academics at UKZN, are presented.</p>
Chapter 8	<p>Phase 3: Qualitative research</p> <p>This chapter presents the results of the qualitative phase covering Aim 3, research objectives 10-11 of the study. Here the outcome of the interviews with organisational stakeholders, the academic line managers and HR specialists at UKZN are presented.</p>
Chapter 9	<p>Discussion of findings</p> <p>This chapter presents a discussion of the results of all three phase of the study, by using a mixed methods design to integrate results into a more meaningful discourse</p>
Chapter 10	<p>Conclusions and recommendations</p> <p>This chapter presents the concluding remarks of the thesis, by integrating and synthesising the themes raised in the discussion chapter whilst reflecting on the main research objectives. The recommendations and directions for future research are also provided.</p>

1.10 Conclusion

This chapter has provided an overview of the study, setting out the motivation for the study including the contribution of the study, its aims and objectives and limitations of the study, and it has provided an overview of the chapters of the study. The next chapter provides a review of the literature on academic mobility in the higher education context.

Chapter 2

Academic Mobility in the Higher Education Context

2.1 Introduction

The literature reviewed in the following three chapters highlight the development of theory in the following subjects:

Chapter Two: Academic mobility in the Higher Education Context

Chapter Three: Expatriate and Self-initiated Expatriate management

Chapter Four: International Careers within the ‘Contemporary careers framework’

These chapters have discussed seminal works as well as more recent works that have further developed these theories. The purpose of this approach is to provide a broad spectrum of understanding of the current literature in these subjects, thereby not only allowing the researcher to have an in-depth understanding of the subject but also to be allowing the study to be underpinned by existing scholarship. This chapter, ‘Academic Mobility in a Higher Education Context’, provides the background to this study, in terms of global mobility patterns and the challenges facing tertiary learning institutions in the SADC region. By providing a synopsis of the present tertiary education landscape in South Africa, as well as an insight into the skills shortages in South Africa, the discourse shows how this impacts on service delivery in higher education. Finally, a deliberation of the policy environment, regulations and immigration practices in South Africa and its impact on the country’s ability to attract expatriates, especially academics, is presented. In this chapter, it is clear to see that there is a gap in the existing literature regarding the recruitment of expatriate academics to meet the current skills shortages in South African higher education. This study will serve to examine the role played by expatriate academics in servicing the current staff shortages in scarce skills disciplines as well as to provide an accurate reflection of the current higher education landscape by identifying the countries of origin as well as the recipient universities of expatriate academics. Currently, there is a dearth of studies that have examined the academic mobility patterns in South African higher education (Altbach, 2004; Maharaj, 2011; Kotecha, Wilson-Strydom and Fongwas, 2012a).

International mobility has long been a feature of academia, with many academics embarking on international mobility in order to develop their careers and to improve their marketability and employability. Often the decision to undertake international mobility rests with the individual. This implies that academics fall into a special category of expatriates called SIEs as stated previously. The characteristics of SIEs are discussed in more detail in Chapter 3. Traditionally, studies of highly skilled individuals who choose to undertake international mobility have done so based on their perceptions of what is best for themselves and their families in terms of lifestyle and career choices (Bhorat, Meyer and Mlatsheni, 2002; Trembly, 2004; Altbach and Knight, 2007). This study examines the international mobility of the highly skilled from a management perspective, focusing on challenges that they face and the benefits they bring to the organisation.

Academic mobility has not been limited to any particular academic level or qualification, neither is it limited to migration from south to north, nor to developing countries (Altbach and Knight, 2007). Recent studies have shown that academics will take on various forms of academic mobility, that is, as a visiting academic, spending a sabbatical or even undertaking a permanent relocation, depending on the attractiveness of the opportunities in the host country in terms of salary, lifestyle and working conditions (Nerdrum and Sarpebakken, 2006; Lewis, 2011; Rasool, Botha and Bisschoff, 2012).

Traditionally, the view that academic mobility is advantageous to students and staff is commonplace in the higher education literature and has become a universal view adopted by higher education leaders, who see it as an important tool for increasing the capability of higher education systems in developing countries (Altbach, 1996, Altbach and Knight, 2007; Richardson and Zikic, 2007, Kishun, 2007). More recently, SARUA (2011:11) suggests that:

Academic mobility provides faculty and students with personal growth opportunities, improves their prospects of employment, generally improves the quality of teaching and research, and provides access to networks across countries; institutions are able to recruit from elsewhere to strengthen their human resource base and in the case of students, earn valuable income in the contexts of shrinking budgets; and countries are able to strengthen their competitiveness and address skills supply constraints.

The chapter is presented as follows:

- Global academic mobility patterns
- “Challenges and opportunities facing Higher education in the Southern African region”
- “A profile of the Higher Education landscape in South Africa”
- Skills shortages in South African Higher Education
- Policy environment, regulations and immigration practices in South Africa

This chapter serves to provide the background of literature required to analyse the following Aim and Objectives:

Aim 1: To investigate the staffing trends amongst academics at South African Higher education institutions over three years 2005/2010/2012

1. To investigate the demographic profile (age/gender/qualification/country of origin) of expatriate academics in South African higher education institutions over three years (2005/2010/2012)
2. To categorise the ranking of South African higher education institutions in terms of the number of expatriate academics employed and their countries of origin over three years (2005/2010/2012)
3. To compare and contrast South African academics with expatriate academics in terms of qualifications, age and gender over three years (2005/2010/2012)
4. To compare and contrast South African with expatriate academic staff at UKZN in terms of age, gender, qualification, field of study and level of academic post for 2005/2010/2012.

2.2 Global academic mobility patterns

Globalisation and, to a lesser degree, regionalisation have led to intricate patterns of academic mobility. Within the northern hemisphere, many academics migrate to the United States of America (USA) and Canada from the United Kingdom (UK) due to deteriorating working conditions (Welch, 2003; MORE 2, 2013). Many African countries, like those in the Southern African Development Community (SADC) region, find that they are losing their highly skilled individuals, including academics, to South Africa (brain gain), while South Africa suffers a brain drain to the UK, the USA, Canada, Australia and Dubai (Jansen, 2013).

“SA is losing artisans, technicians, doctors, nurses, teachers and accountants in increasing numbers” (Rasool, 2010:34). A recent study has found that 40% of skilled South Africans across all race groups are considering emigrating (Rasool, 2010). In comparison, in 2000, the number was a mere 18% (Bissekar and Paton, 2005:20). According to the Centre for Enterprise Development (CDE, 2007a:17), population pyramids reveal that there is large-scale emigration of whites between the ages of 25 and 34 years, the most economically active and skilled group. This is supported by figures from host countries such as the UK and Australia endorsing significant emigration from South Africa for the period 1995-2005 (CDE, 2007a:17). This phenomenon is referred to as ‘brain drain’ and describes the migration of highly educated, highly skilled workers from their countries of origin to countries that are more attractive in terms of salary, working conditions and living conditions (Nerdrum and Sarpebakken, 2006; Lewis, 2011; Rasool, Botha and Bisschoff, 2012). This phenomenon, together with the prevailing skills shortages and HIV/AIDS, has led to the current crisis in South Africa.

Salaries in academia range from R 40 000 for lecturers to R 94 000 for professors per month in South Africa (Altbach, Reisburg and Pacheco, 2012:5). Despite a recent study undertaken by Professor Phillip Altbach, Director of the Center for Higher Education in the USA, who found that “South African academics are among the best paid in the world, they are the third highest paid in the world after Canada and Italy the cost of living is taken into consideration” (Altbach et al, 2012:3). Higher Education South Africa (HESA) has recognised that academia was still not “a particularly attractive career option because of relatively low salaries, expanding student numbers and heavy workloads” (Jansen, 2013:1). Sehoole (2012) has argued that the conditions of service at South African universities are unfortunately not uniform across all institutions; in any event, salaries in academia could not compete with those in the private sector. A contributing factor to this dichotomous situation is the deterioration of the academic quality of life due to less than ideal staff to student ratios (Jansen, 2013). These are some of the complexities of the dynamic situation in South African higher education today.

Other regions like the Middle East have witnessed an influx of Egyptian, Jordanian and Palestinian academics into Arabian Gulf universities as they are attracted by the superior salaries and more suitable working conditions than those in their home countries (Altbach, 2004: 67). Indian and Pakistani academics are enticed by similar ‘pull’ factors to countries in the Arabian Gulf, South-East Asia, the USA and Canada. Singapore and Hong Kong have

drawn in academics from all parts of the world. Mexico and Brazil entice academics from other South American countries (Altbach and Knight, 2007; Altbach, et al, 2012:7).

As the current study is based in South Africa, a closer examination of the challenges faced in the African higher education context, and in particular the Southern African context is necessary as many of the challenges and opportunities are regionally based. “The most noteworthy challenges academics in African higher education have to contend with are political and legislative challenges, inadequate emphasis on science and technology, admission into and need for higher education, financial constraints, quality control issues, inadequate adoption of ICT’s (information communication technology) and poor infrastructure as well as regionalisation (Kotecha et al,2012a:23).

As previous stated many of the challenges facing the higher education in Africa are similar, but will be examined more extensively from a Southern African (SADC) regional perspective which is the focus of the next section in this chapter.

2.3 Challenges facing higher education in the SADC region

“The challenges faced by Education and Training in the sub-region are largely common to all countries. These are access, equity, quality, efficiency, relevance and democracy in their educational and training policies” (SADC 2007a:1).

As the quotation above illustrates, many of the challenges faced by higher education in South Africa are common to the SADC region. Therefore it is important to examine the impact these challenges have had on higher education in the region in order to establish the context of academic mobility into South African higher education institutions which is the focus of this study. These challenges are now discussed.

2.3.1 Political instability and governance challenges

Many African countries have either historically or recently been affected by poor governance or are recovering from some kind of political instability. This situation, together with failing structural adjustment programmes (SAPs), has put many African governments at a disadvantage in terms of achieving their socio-economic development objectives. In many instances, this has led to political and socio-economic turmoil. Examples from the region

include military conflicts in Angola (2002), the hostile military takeover of the government in Madagascar (2009) (Ploch, 2011:7), the political unrest and economic recession in Zimbabwe (late 1990s and 2000s), and the crippling civil war in the Democratic Republic of the Congo (DRC) (1990s and early 2000s) (Sawyer, 2004:211; Assié-Lumumba, 2006).

Sayed, Mackenzie, Shall and Ward (2008:12) observed that low registration numbers of students in Angola, Mozambique and the DRC are a consequence of ongoing and crippling socio-political conflicts that almost completely destroyed the education sector. SARUA has recorded the negative impact of the civil unrest and economic recession on higher education in Zimbabwe (SARUA 2010, 2011). Socio-political conflicts have had a direct and indirect influence on the higher education situation regionally, some include shortages of capital resources, disruptions in academic programmes, damage to infrastructure, the migration of academics, often accompanied by strong restrictions placed on scholarship generated at higher education institutions (Sall, 2004:211). This situation has led to South Africa becoming attractive as a host country due to its relative political stability as well as its economic stability during the recent global recession.

2.3.2 Limited focus on science and technology

Mwapachu (2010:3) indicates that 28% of students in African universities are registered for science and technology programmes (21% in SADC). Edigheji (2009:63) in a recent SARUA publication argues that higher education must create academic programmes with the intention of equipping learners with critical thinking skills and the abilities for planning, designing and formulating new products and services, thereby assisting in strengthening the human capital foundation.

Kotecha et al. (2012a:23) states that several authors (see for example Giroux 2002; Robeyns 2006; Walker 2009; Nussbaum 2010; Tikly and Barrett 2011) have argued that the call for more science and technology programmes in Africa should not be at the sacrifice of the humanities and social sciences. The health sciences, science, engineering and technology, business, management and law fields have the highest scarcity of human resources. This would imply that this is a common problem across Africa, where there is a shortage of skills in these fields (SARUA, 2011; Kotecha et al., 2012a). The South African government realised by 2002 that, due to the skills shortages in the economy in the information technology, finance and engineering disciplines, there would be a need to bring in foreign

workers to help overcome the shortage and assist in assimilating South Africa into the global marketplace and launched JIPSA (The Presidency, 2006). Thus the focus in this study is on the inflow of expatriate academics into higher education institutions so as to investigate the role they play in the alleviation of the skills and staff shortages in South Africa.

2.3.3 Access and demand for higher education

After more than five decades since liberation, higher education in many African countries remained exclusive. The global standard for accessibility to higher education has increased from 19% in 2000, to 26% in 2007. In comparison, African learners able to gain access to higher education stands at a mere 5%, while more than 40% of their counterparts in the Organisation for Economic Cooperation and Development are able to access higher education” (UNESCO, 2009:7).

Mauritius currently has the highest single country registration rate of 17% with 17 000 students in higher education, while South Africa and Nigeria, with gross enrolment ratios of 15% (753 000 students) and 10% (more than 1.3 million students) respectively, have admitted more than half of all students currently in higher education in sub-Saharan Africa” (MacGregor 2009:6). In the SADC context, South Africa has the highest number of university admissions, graduates and research outputs. At the start of the 2012 academic year, South African tertiary institutions rejected a number of applications because of restricted space at the public universities. According to a *University World News* online publication of 13 January 2012, “universities and diploma colleges have only 180 000 places for first-year students while [...] some 250 000 South Africans passed their final high school exams at a level that qualified them for admission to tertiary institutions”.

Kariwo (2007) observed similar problems in Zimbabwe where roughly 8 000 students who qualify to enter university cannot get access. Although the Open University of Zimbabwe presently admits more than 24 000 students, there is still a huge demand for places at the other 12 Zimbabwe universities. Students who do not get admission in Zimbabwean universities find themselves having to relocate to neighbouring countries like South Africa or study overseas (Kawiro, 2007; Kotecha, Wilson-Strydom and Fongwas, 2012b).

According to the *Mail and Guardian online* publication of 2 March 2012, a recent audit report by Rhodes University argues that “throwing open the doors of learning without providing the minimum support required to ensure a reasonable chance of success is not only

irresponsible, but also dehumanising and is negating the very intention of increasing access to higher education” (MacFarlane, 2012:1). Thus the problem in South African higher education is not only accessibility for students but ensuring that this access is meaningful. In any event providing university access to students implies having suitably qualified staff to run academic programmes. Institutions of higher education are constantly under pressure to increase their enrolment targets; this means that they need to have the academic staff available to ensure the smooth implementation of teaching and learning programmes. In order to increase the output of post-graduate students, institutions of higher education need to have suitably qualified academics, either with a Masters or a Doctoral degree. To that end this study examines the staff profile of academics in South African higher education in terms of qualifications in order to explore the reasons why there has been a need to recruit expatriate academics.

2.3.4 Funding constraints

Johnstone (2004:23) argued that even though higher education funding has changed in all higher education systems worldwide, developing economies were the most affected. Even though African governments had assigned a sizeable portion of their gross domestic product (GDP) budget for higher education, the structural adjustment programmes of the 1980s, the economic disasters of the mid-1990s, and the more recent international recession have contributed to the deteriorating financial situation in higher education in Africa (Oketch, 2003:88).

Most African countries have instituted cost-sharing procedures in order to access financial support. Namibia and Zimbabwe are among the countries with some form of cost-sharing financial support for those in tertiary education, while Zambia and Tanzania have created a dual-track system where concession students study alongside financially viable students (Pillay, 2008a:23). In countries such as South Africa and Namibia, all higher education students are liable for fees, but students from disadvantaged communities can apply for financial aid from programmes such as the South African National Student Financial Aid Scheme (NSFAS) (Pillay, 2008a: 25). Similar financial aid schemes have been implemented in other countries such as Tanzania, Lesotho and Kenya to deal with the financial needs of disadvantaged students. With the exception of South Africa, most of these loan schemes have not been successful in recovering the funds, so most of these loans have ended up being veiled scholarships or bursaries (Pillay, 2008a:34).

Pillay (2008b) found that many countries in Africa and the SADC region, excluding South Africa and Mauritius, do not have a financial aid scheme as part of government strategy. While the situation is slowly changing, the lack of a financial support puts countries at risk to outside influences such as inflation, and illustrates a lack of co-ordinated planning at national, system-wide and institutional levels (Pillay, 2008b:4).

Cloete, Bailey, Pillay, Bunting and Maassen (2011:11) in a recent study argued that, while African higher education institutions are obtaining financial aid from foreign benefactors, who provide a ‘third-stream income’, academic research is being neglected at most universities in the region. This ‘third stream income’, as described by Cloete et al. (2011), often is at the expense of the fundamental academic and knowledge production function of the universities. Ishengoma (2010:45) argues that donor funding as a ‘third stream income’ in Africa and elsewhere tends to be disjointed coordinated with national policy, placing serious constraints on the development of higher education as a whole.

2.3.5 *Quality concerns*

The need for ‘better academic quality’ in terms qualified staff, relevant curriculum development and delivery as well as aging and ill equipped infrastructure for higher education in Africa and the SADC region in the last decade has received increasing attention (Materu 2007; Mhlanga 2008). As explained in a World Bank study:

“One of the major problems of African education is not as most think – universality; rather it is quality which is the problem. Africa needs thinkers, scientists, researchers, real educators who can potentially contribute to societal development” (Yeneayhu, 2006:12).

Issues affecting ‘academic quality’ reveal themselves in various ways including lack of well stocked libraries, poor academic and laboratory infrastructure, high staff versus student ratios, demoralised staff, an ageing professoriate, academics with high workloads who are choosing to immigrate to other regions with better conditions of service, and often obsolete curricula (Kotecha et al, 2012a: 12).

A critical marker illustrating the need for better academic quality is the lack of applicability to a practical context of most curricula as well as the graduates produced (SADC, 2007; Yizengaw, 2008). In other words, learning at tertiary institutions needs to be cognisant of the producing competent graduates who can enter the workplace. Based on previous studies and

document reviews, the UNESCO/ADEA Task Force for Higher Education and Research in Africa suggested that higher education institutions should be more relevant in their academic programmes and the mode of delivery to students (UNESCO/ADEA, 2009:9). The task force further observed that institutions should be “supported to serve the priorities and needs of Africa’s development through [a] socio-culturally relevant curriculum and curriculum delivery, particularly in the fields of Science and Technology”, while at the national level, “development plans should match graduate output with national human resource needs in order to minimise graduate unemployment” (UNESCO/ADEA, 2009:34).

Assié-Lumumba (2006) argues that, while human capital and technology-development is critical in higher education, the human capital development role of the university must not be neglected and should be manifested in the curriculum to ensure that higher education meets the overall needs of society. On the whole, the poor quality of the knowledge production in the SADC region is aggravated by the low quality and quantity of academic and research staff in the universities. Kotecha, Walwyn and Pinto (2011:34) reflected in a SARUA study that with the exception of South Africa and Mauritius that had a PhD qualification rate of above 0.3 PhDs/FTE/year; all the other SADC countries had rates lower than 0.1 PhDs/FTE/year. These findings in the SADC region were supported by Cloete et al. (2011:28), who conducted case studies in eight African countries and found that only South Africa (University of Cape Town-UCT) and Mauritius (University of Mauritius-UoM) had cases where more than 40% of their staff held a PhD qualification (UCT: 58% and UoM: 45% in 2007).

Problems with the standard of quality assurance and accreditation processes in different African countries are also an issue. Aging infrastructure and educational resources, comprising of the lack of adequate information and communication technology (ICT), as well as a serious shortage of resources and infrastructure only added to the challenges African countries had when trying to attract international staff and students (Kotecha et al, 2012a:13).

Due to low compensation and limited research infrastructure, exacerbated by the effects of the HIV/AIDS pandemic, many African academics have migrated to developed economies (Assié-Lumumba, 2006). South Africa has been a major target for academics from Africa, leaving other African universities facing staff and skills shortages. Just around 25% of academics in Africa have a PhD qualification, and this has had an impact on the rate of publications in academia (Cloete et al, 2011:12). Publication data reveals that, while “academics are expected to publish an average of 1 to 1.4 publications per full-time

equivalent (FTE) staff member per year, which is considered as the South African standard, academics at flagship universities in Tanzania, Mauritius, Mozambique and Botswana all have publication rates of less than 0.4 publications per FTE academic per year” (Cloete et al., 2011:12).

South African universities are the only universities in Africa to feature prominently in the world university rankings (QS rankings) consistently in recent years. Five of South Africa’s universities are ranked in the top 100 emerging economies university rankings list (MacFarlane, 2013). This is a new ranking list developed by the Times Higher Education group in an effort to rank the universities in BRICS (Brazil, Russia, India, China and South Africa). The University of Cape Town (UCT) was placed third, followed by The University of the Witwatersrand (WITS) that placed fifteenth; next was the University of Stellenbosch in twenty-first position, then the University of KwaZulu-Natal (UKZN) at forty-fifth position and finally the University of Pretoria (UP) at seventy-eighth position. The world-wide ranking scale known as the *Quacquarelli Symonds* (QS) ranking for 2013/2014 ranked UCT at 145, Wits at 313, Stellenbosch at 387, UP at 471-480 and finally UKZN at 501-550 (MacFarlane, 2013; *Quacquarelli Symonds* Limited, 2014). Wits University vice-chancellor Adam Habib stated that they are attempting to attract the best talented academics from South Africa and abroad, as well as postdoctoral students as this would assist them in elevating their research profile both quantitatively and qualitatively (Davies, 2013:1). Wits University in Johannesburg is the country’s second highest ranked institution and has improved by a huge 50 positions to 313 on the Quacquarelli Symonds (QS) World University rankings for this year (Davies, 2013). Best Global Universities rankings (2014) placed UCT at 151, WITS at 270, Stellenbosch University at 371 and UKZN at 417.

According to Gerda Kruger, executive director of Communication and Marketing at UCT, “a good performance in international rankings does assist in sending out the message that world-class education is available in South Africa”. MacFarlane (2013:1) argues that both potential students and academics globally employ these rankings to decide where they want to study and work. Knight (2006) observes that long-term academic mobility generally favours universities with a good reputation in terms of research and teaching.

Dugmore Mphuthing, Deputy Director of SAQA (South African Qualifications Authority) reiterates the view that “South African higher education institutions are a magnet for other African graduates and those from other parts of the world both as places of work and study,

because of their good reputations, which brings diversity to our systems and processes as it provides potential students and academics the opportunity to discover that a world class education is available in South Africa” (Regenesys Business School, 2013:1). Indeed, as a result of the noteworthy international profile of South Africa’s flagship universities such as WITS and UCT, there is a need to develop a well organised support structure devoted to the day-to-day operational aspects of the expatriate academics stay as well as a corresponding increase in the amount and quality of exchange programmes for staff and students across the SADC region (Govender, 2014b:1). This would definitely play a positive role in attracting global talent to South African universities.

2.3.6 Access to and use of Information Communication Technology

The World Bank Institute’s Knowledge for Development (K4D) programme has identified building blocks that need to act as the foundation upon which to build a knowledge-based society (World Bank, 2007a). Chen and Dahlman (2005:23) refer to these components as ‘pillars for the knowledge economy’ and further state that these comprise of “an educated labour force, an effective innovation system, adequate information and communication technology (ICT) infrastructure, and a conducive business and governance framework”. However, most universities in Africa are severely restricted by their poor ICT infrastructure and availability of high-speed Internet connectivity, excluding South Africa and Mauritius (Kotecha et al, 2012b). In any event, this would enhance the attractiveness of South Africa as a destination of choice for expatriate academics from the African continent.

2.3.7 Regionalisation

Globalisation has led to the integration of economic and political zones and decreased special barriers (Neave 2009). In this contemporary environment, universities find themselves having to compete with other universities in an international context. Thus, they have been compelled to meet new managerial, financing and knowledge production standards at an international level in order to join to international networks. Kotecha et al. (2012a: 14) argues that increased co-operation and the creation of networks with other tertiary education sectors holds great potential for Africa as a whole and the SADC region in specifically.

Jansen, McLellan and Greene (2008:390-391) argued that internationalisation is beneficial to South Africa, because of the need to redress past imbalances of apartheid that alienated SA

from its neighbours. However, regionalisation of higher education in the SADC region poses many challenges, these include the diversity and inequality of countries and higher education systems in the SADC region, as well as the spoken languages in the region such as English, French and Portuguese (Oyewole, 2009:319). Further challenges include the different credit and assessment criteria, different academic programmes, the quality and recognition of higher education institutions, limited financial resources, and different political dispensations hamper regional integration processes in higher education (Jansen et al, 2008:390). It is also clear that there are inequalities amongst universities within a single country. Therefore it maybe that higher education at a regional level and at a national level may not be one and the same. This does not bode well for institutional and national commitments to the implementation of protocols between countries (Mogobe, Meyer and Bruce, 2009:7).

Furthermore there is a scarcity of systematically generated and easily accessible data available on a regional database. This could be due to fairly weak data collection and accumulation processes in the region. Perhaps another reason could be that many countries do not have the institutional and technical capacity to collect data over a period of time and on a continued basis. Also, many do not have the political resolve to do so as sometimes the data are used for political ends (Mogobe et al., 2009). Poor financial and human resources have been identified as another critical issue challenging the implementation of the regional protocols and integration of higher education systems in the region (Hahn 2005; Ngwenya, 2011). Further challenges include corruption and nepotism as this undermines the opportunity for continued relationships with specific governmental agents on the process of regional integration (Ngwenya, 2011:25).

Another major challenge in terms of higher education in Africa and also in the SADC region is the “lack of standardised instruments which promote internationalisation activities...in the form of credit accumulation and transfer systems (CATS)” (Mogobe et al., 2009:9). Dugmore Mphuthing, Deputy Director of South African Qualifications Authority (SAQA), has commented on the role that needed to be played by higher education in dealing with the crises facing education in South Africa. Mphuthing states that there should be a greater emphasis on foundation courses and recognition of prior learning” (Regenesys Business School, 2013:1). In order for admissions at international institutions to be less restrictive, there needs to be a system in place that recognises qualifications as equivalent or compatible to local entrance requirements (Hahn, 2005). SADC countries have tried to rectify this

situation by developing the SADC Qualification Framework (SADCQF) but this is proving challenging due to the issues raised above (Mogobe et al, 2009:11).

This chapter has stressed the challenges facing higher education in Africa and SADC in particular. Higher education and universities in Africa are presented with many challenges in trying to fulfil their role as knowledge producers. Globalisation has influenced all aspects of the economy and many African governments are still struggling to break historical relationships with colonial powers. As a result, they face the challenge of meeting the growing needs of their citizens, while struggling to obtain scarce financial and human resources in order to reidentify themselves regional and as well as internationally. In the next section, a profile of the higher education landscape in South Africa will be created in order to illustrate how the challenges examined in this section, impact on South African higher education and to further contextualise the need for expatriate academics.

2.4 Profiling the higher education landscape in South Africa

There has been a dearth of studies that have sought to profile the higher education landscape in South Africa. The majority of existing studies have focused on the demographics of the student population, with very little attention being paid to the demographics of the academic staff population. The section below presents an overview of the South African higher education landscape commissioned by SARUA in 2012, in terms of the number of public tertiary institutions in the country, staff profile in terms of gender, country of origin, major fields of study, highest qualifications and staff shortages.

Table 2.1 presents a summary of the number of higher education institutions both public and private currently operating in South Africa. According to the report commissioned by SARUA and completed by Kotecha et al. (2012a:18), there are “17 publically funded universities and six publically funded technical universities and colleges. The report goes further to indicate that there are 118 privately funded, accredited universities and colleges operating in the higher education sector in South Africa. There are also 50 Further Education and Training (FET) colleges operating in the higher education environment in South Africa”. For the purposes of this study, only those institutions that are publically funded, that is, that receive government funding, will be examined; therefore a total of 23 institutions of higher learning will be examined in terms of their staff profile.

Table 2-1 Number of higher education institutions in South Africa currently

Country	Number of publically funded universities	Number of publically funded technical universities/colleges	Number of privately funded accredited universities and colleges	Other higher education institutions
South Africa	17	6	118	50 (FET colleges)

Adapted from: Kotecha et al (2012a:18).

According to the report, South African higher education academic staff consists of more male than female staff; this is consistent for both permanent and temporary staff members. Table 2.2 illustrates that 55.97% of permanent staff are male, with 44.02% being female, and 52.17% of temporary staff are male, with 47.82% being female. This is consistent with the findings from studies of “other countries in Africa, like Angola, Botswana, Tanzania and Zimbabwe” (Kotecha et al., 2012a:26).

Table 2-2 Gender distribution of permanent and temporary academic staff as at 2010

Country	Permanent (Male)	Permanent (Female)	Temporary (Male)	Temporary (Female)
South Africa	9291	7307	15510	14219

Adapted from: Kotecha et al (2012a:26).

The results of the study illustrated in Table 2.3 show that the majority of staff employed by South African higher education institutions are “South African citizens (91.21%), with 3.06% of academics from SADC countries (that is, Angola, Botswana, Democratic Republic of Congo, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Seychelles, Swaziland, Tanzania, Zambia and Zimbabwe) and 5.64% of academics being from other international countries” (Kotecha et al, 2012a:79).

Table 2-3 Nationality of academic staff in South African higher education institutions as at 2010

Country	National citizens	SADC	Other international
South Africa	41410	1391	2562

Adapted from: Kotecha et al (2012a: 79).

Maharaj (2011) undertook a study that specifically examined the profile of expatriate academic staff at South African higher education institutions. The purpose of this study were to identify if there was an increasing number of expatriate academics entering South African higher education institutions for 2000-2008, as well as to ascertain the main contributing regions of the expatriate academics. The results indicated that there was an 8% increase over a 9 year period from 2000-2008 in the number of expatriate academics coming into South African institutions of higher learning (Maharaj, 2011:91). In terms of supply regions African countries contributed almost 50% of expatriate academics, and Zimbabwe made up

the majority of this supply with 20% of expatriate academics. Europe was the second highest single supplier of expatriate academics to South African HEI's with almost 42%. Asian countries contributed 6% of the total inflow of expatriate academics, while Australia contributed 2% in 2008 (Maharaj, 2011:91).

Maharaj's (2011) results support the findings of the study commissioned by Carnegie completed by Altbach (1996) as well as of the SARUA study where it was found that South African institutions were recruiting mainly from other African countries.

Table 2-4 Number of academic staff by major field of study as at 2010

Country	Agriculture	Business / Law / Management	Education	Health Sciences	Humanities and Social Science	Science / Engineering / Technology	Other
South Africa	416	3529	1204	1973	3206	5182	0

Adapted from: Kotecha et al (2012a: 28).

In the study commissioned by SARUA (Kotecha et al., 2012a: 28), it is demonstrated that the biggest number of academic staff are found in the science, engineering and technology disciplines (27%), followed by the humanities and social sciences (21%) and business, management and law (18%) (Table 2.4). The study conducted an investigation of staff deficiencies in tertiary education in SA. This revealed that there were staff deficiencies in the science, engineering and technology disciplines, followed by the health sciences, business management and law and agriculture disciplines (Kotecha et al, 2012a:28). This is a manifestation of the situation in South Africa at the moment, with skills shortages in the science, engineering and technology fields. These fields are found on the 2012-2013 Scarce Skills List published by the Department of Labour (DOL) (Kotecha, Lotz-Sisitka and Urquhart 2014).

The findings of the SARUA study conducted by Kotecha et al. (2012a) show that the number of staff members according to level of qualification has remained consistent when comparing the 2006 and 2010 data. The proportion of academic staff holding a doctoral qualification ranged from 28 to 30% for 2006 and 2010. Those academics with a Masters qualification ranged from 30 to 31% when comparing the 2006 and 2010 data. Academics with a post-graduate qualification lower than that of a Masters degree remained the same at 9%, with those academics holding an undergraduate qualification remaining consistent at 18% for 2006 and 2010 (Kotecha et al., 2012a:30). This is slightly better than the statistics for Africa in general, where only 25% of all academics hold a doctoral qualification (Cloete, et al, 2011:12). This situation would seem to indicate that there is a shortage of highly skilled

academics (that is, those with doctoral qualifications) in the South African higher education system. The South African government and university management across higher education institutions are cognisant of the issue and have developed innovative policies to improve the problem by 2015 such as increased funding opportunities and the increased availability of post-graduate student support on campuses across South Africa, such as the South African PhD Project (funded by the NRF), and the National Development Plan 2030 (Govender, 2014a:1).

Reflecting an annual increase of almost 7%, the International Education Association of South African (IEASA) reported that there were just under 900 000 students registered at higher education institutions in South Africa in 2010 (IEASA, 2011:13). There were 64 000 international students at South African higher education institutions in 2010 (IEASA, 2011). This trend means that there will be an increasing demand for appropriately qualified and experienced staff. According to the CEO of the Education, Training and Development (ETDP) SETA, there is shortage of suitably qualified staff in higher education institutions” (IEASA, 2011:13). Figure 2.1 illustrates that in South Africa, academics with doctoral qualifications constitute only 40% of the staff in public higher education facilities. Even in the most popular research institutions in the country, University of Cape Town and Wits, just under two thirds of the staff have PhDs (IEASA, 2011).

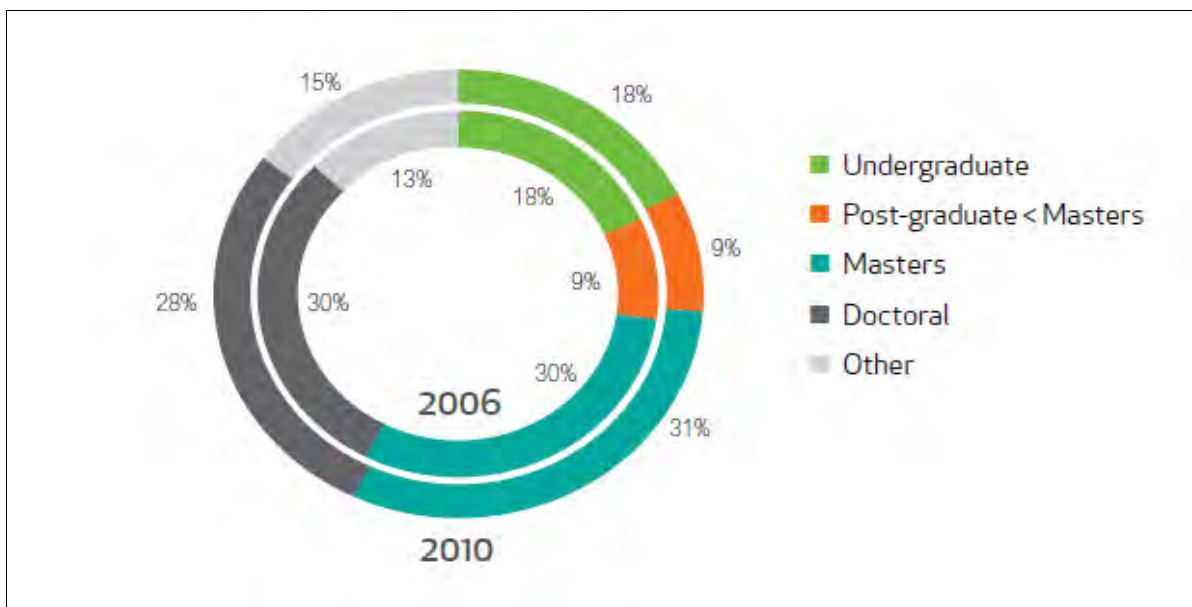


Figure 2-1 Highest level of qualification for academic staff for 2006 and 2010

Adapted from: Kotecha (2012a: 30).

Thus, the implication is that South African higher education institutions are suffering from a skills shortage, as only 40% of the total number of academics has a doctoral qualification; this seriously impacts on the institutions ability to design, implement and deliver high quality academic programmes (Kotecha, 2012a; Govender, 2014a).

The profile of the higher education landscape of South Africa provided in this section has served to illustrate the staffing situation at publically-funded universities, universities of technology and technical colleges. This was done with the aim of highlighting the disciplines where staff shortages exist in order to assess whether these disciplines can be categorized on the South African Scarce Skills List 2013-2014 (Kotecha et al, 2014). In addition, the identification of the proportion of academic staff holding different levels of qualifications illustrated the need to recruit highly skilled academics (those holding a doctoral qualification) in order to fill high level academic posts such as professors and senior lecturers. Furthermore, the aim was to examine the number of expatriate academics at South African higher education institutions in comparison to their South African colleagues and to identify their countries of origin. This served as the foundation upon which to build this study in order to identify where South Africa is currently recruiting its academic human capital from. The next section focuses on the current skills shortages faced by South Africa at large and in particular the higher education context.

2.5 Skills shortages in South African higher education

With global higher education facing ever increasingly complex challenges, higher education in South Africa has tried to keep up, while also attempting to improve both its size and quality. An increasing emphasis on knowledge, development planning, higher education, research and government institutions are attempting to build a knowledge-based society. There has been an increased allocation of funds to higher education in the national GDP over the past five years (Financial and Fiscal Commission, 2012).

Since 2012, there have been many changes to South Africa's higher education landscape. Including the announcement of the construction of two new universities in Mpumalanga and Limpopo provinces and also the introduction of an additional R850 million to develop university infrastructure (Govender, 2014a:1). Moreover, benefactor funding of almost R60 million was made available for the 2012/2013 and 2013/2014 academic year through general

budget support (Govender, 2014a:1). This additional funding was used to develop a national career guidance system that created a portal for accessibility to general information on careers, economic indicators and learnerships and internship opportunities for numerous careers (Govender, 2014a:1).

Another key issue in the South African higher education debate has been producing sufficient skills that are relevant to an economy trying to change itself into a knowledge-based economy. Many plans have put in place; but, in terms of the skills shortages in engineering, natural sciences, human and animal health and in teacher education (which directly affects the readiness of school leavers entering the higher education system), there seems much still needs to be done (Govender, 2014a). The Minister of Higher Education and Training stated on the 24 May 2012 in *The Sowetan newspaper (2012:1)* that “we are engaging with higher education South Africa, and deans of relevant faculties to accelerate especially black and women graduate output in these areas to provide the relevant and needed skills for a knowledge economy”. Plans included the introduction of a six year scholarship programme to increase the number of black potential academics and provide support for postgraduate qualifications (Govender, 2014a:1). In a survey reportedly done by the *Sunday Times newspaper (2014:1)* on the 14 September 2014, the pace of transformation at 13 higher education institutions was found to be slow, especially in terms of equity for those holding professor and associate professor posts. The results also indicated that some universities employed large numbers of expatriate academics. This recruitment drive was a consequence of 4000 academics whom were eligible to retire over the next six years thus creating a substantial brain drain on the higher education sector (Govender, 2014a). According to an article by Govender (2014b:1) in the *Sunday Times newspaper* on the 5 October 2014, huge amounts of money was being spent on recruitment of foreign academics countrywide as these institutions try to deal with the growing deficit of suitably qualified academics.

Govender (2014b:1) states that almost 29 % of the teaching staff at WITS and one out of every four academics at UCT are foreign academics. In the article, WITS vice chancellor, Adam Habib argues that the skills shortages are not only in terms of equity but also due to the rapidly aging professoriate. He further argues that even if did not have a shortage of academics, it was important to have an international professoriate as it lends a global vibe to the institution (Govender, 2014b:1).

Due to ongoing skills shortages in South Africa, the government had realised that there would be a need to bring in foreign workers to help overcome the shortage and to assist in

assimilating South Africa into the global marketplace as well as to make changes to the South African higher education landscape. This need was to be addressed by the South African's government's economic policy known as the Joint Initiative on Priority Skills Acquisition (JIPSA) (The Presidency, 2006). The role of the skilled immigrant was seen as having a dual purpose (Rasool et al., 2012:404):

- “firstly, to enhance the economy
- secondly, to transfer the skills and experience to the local workforce”.

This is true in the higher education environment, as experts are needed to train students in scarce skills disciplines to take up positions in areas directly affected by the skills shortages in the country, the South African government plans to spend R10-million to hire experts from the professions and industry to teach or assist with supervision of research (Govender, 2014a:1). Thus many higher education institutions are now recruiting expatriate academics in an attempt to staff their scarce skills disciplines and to ensure in this way that teaching and learning continues uninterrupted. As part of the Department of Higher Education's plan to boost the number of academics at universities the appointment of 100 academics from developing countries on fixed term contracts at a cost of R30-million a year has also been proposed (Govender, 2014a:1).

However, the current politico-legal environment in South Africa has proved to be an obstacle to this proposed solution. An overview of the policy environment, regulations and immigration practices in South Africa will be provided.

2.6 Policy environment, regulations and immigration practices in South Africa

While the apartheid government attracted many skilled foreign European workers from 1970 to 1980, this inflow turned into a major outflow once South Africa became a democracy in 1994 (Rasool, 2010:37). The primary causes mentioned for loss of skilled South Africans concern “crime, decline in service delivery, poor quality of life, unhappiness with the political situation, declining education standards and inadequate government health care” (Bailey, 2003:235). Various authors (Bernstein, 2000; Bhorat et al, 2002; Rasool, 2010; and

Rasool et al, 2012) concur that the shortage of skilled labour is a major obstacle for development and service delivery in the higher education sector (Rasool et al, 2012: 399).

Compared to this mass exodus, there is a corresponding drop in immigrant inflow. This can be largely accredited to South Africa's restrictive immigration policy as well as various socio-economic and political factors (Rasool, 2010; Rasool et al, 2012). In 1994, the South African government revised the Aliens Control Act No. 95 of 1991, which dealt with 'admission, control and expulsion of foreigners' (CDE, 2002:7). Thereafter, there was the passing of the Immigration Amendment Act No. 19 of 2004 and the Immigration Regulations of June 2005 (CDE, 2007:9). However, the guidelines prescribed by the policy for skills immigration were limiting in many categories and include "quota work permits, application backlogs, evaluation of qualifications, police clearance, business permits, intra company transfer work permits, permanent residence permits/applications, and documentation" (CDE, 2007:10). Thus, the recruitment of skilled foreign workers in all sectors to help reduce the skills shortages of the country has proved challenging.

The situation referred to has noteworthy socio-economic consequences for SA. If, South Africa wants to be globally competitive then a more creative strategy to skills immigration could be part of the solution to the skills shortages facing SA currently. The world economy has become a truly global marketplace and there is an ever increasing demand for skilled labour. This global mobility of skilled labour can be accredited to many factors such as political unrest, inferior working conditions, better salaries and healthier work-life balance (World Bank, 2003:343). Economies that have employed immigrants have achieved tremendous economic and cultural development. Examples of countries with dominant immigrant economies include the USA, Canada, Australia and Singapore and have been the leaders in economic development and continually source skilled South Africans (Rasool, 2010:39).

Attempts to bring in immigrants to work in local firms have proven to be problematic. A list of consisting of professional categories and occupational classes have been identified and work permits made available. Naledi Pandor, current Minister of Home Affairs, has said that "the target for attracting scarce skills had been 50,000 permits issued in 2011 but that only about 20,000 were issued" (Hartley, 2013:1). South Africa's restraining skills immigration policy and regulations are also a problem (Bhorat et al., 2002; CDE, 2008; Ellis, 2008). The United Nations, Department of Economic and Social Affairs, International Migration Policies (2013) corroborated the view of other critics, stating that "South Africa's view of

immigration is too complicated and their policies on highly skilled migration need to be revisited to make it more conducive to be competitive on a global stage” (United Nations, 2013:7). Makochehanwa and Maringwa (2009:13) argue that this is a common situation in African countries, where the freedom of movement of people is subject to restrictive visa requirements, application processes and exorbitant administrative costs. On 21 August 2014, the *Business Day Live* reported that “South Africa and Kenya were involved in a reciprocally destructive visa requirements dispute that would have seen those travelling to either country for less than 30 days paying an administrative fee of R750. This kind of action would have a destructive impact on travel, tourism and trade between Africa’s two major nations”. Fortunately, the proposed action has been put on hold since August 2014 pending further negotiations between the two countries (Hedley, 2014).

According to Rasool, (2010), there are a number of issues in South Africa’s immigration policy that make it restrictive for institutions and businesses to recruit skilled foreign workers. There has been an ongoing debate around how to raise the level, quantity and quality of skills in South Africa and these ideas appear in the top priority lists of the Ministries of Labour, Science and Technology, Trade and Industry, Education and the Presidency’s Accelerated and Shared Growth Initiative for South Africa (ASGI-SA) programme as well as the Joint Initiative on Priority Skills Acquisition (JIPSA) (The Presidency, 2006a; The Presidency, 2006b).

The ASGI-SA is a comprehensive government plan that was launched to ensure the continuation of South Africa’s economic growth. One of the key elements of this plan is to recruit skilled foreigners in certain key areas (The Presidency, 2006a). In 2003, during the July 2003 Cabinet Lekgotla, it was agreed that SouthAfrica has to entice skilled labour into SA meet growth and development challenges (Hartley, 2013:1). Further, the Cabinet agreed that along with international recruitment, a portion of the National Student Financial Aid Scheme and the National Skills Fund needed to be allocated to training in these areas (Hartley, 2013:1).

As the ‘power house’ of the African continent, South Africa is well positioned to attract skilled Africans who are pushed out of their own environment for a variety of political, economic and developmental reasons. According to the New Immigration Act 2013, there are now two immigration categories (Government Gazette, Immigration Act 13, 2011:19), namely, **Direct residence (Section 26)** and **Residence on other grounds (Section 27)**

To stay in line with the new policies, changes were made to the Immigration Act 13 of 2002 (Government Gazette, Immigration Act 13 of 2002:45). These regulations have far reaching implications for any foreign workers, whether highly skilled or not, who would have to leave South Africa in order to reapply or make changes to their work permits, and this would cause unnecessary stress and expense on the part of foreign worker. This obstacle may lead to many foreign skilled workers deciding to leave the country once their permits have expired. This does not bode well for the retention of highly skilled workers in South Africa.

There has already been some criticism in the media (Mahlaka, 2014; Oosthuizen, 2014) over predictable delays when recruiters want to bring in skilled employees as a police clearance certificate and SAQA verification are required. Concerns were also raised during the public comments process of the new Act that the requirements for work and business permits are difficult and ineffective, and this could be an obstacle to the recruitment of the necessary skills (Oosthuizen, 2014:1). Scarcity in the higher education sector can be seen as unconditional, as a shortage of highly skilled academics prevents the execution of strategic growth and results in quality issues and delivery issues (DOL, 2007:63).

A further challenge to the recruitment of expatriate academics, and indeed of all foreign workers in general in South Africa, is the opinion of many South Africans that foreign academics and workers from neighbouring countries are here to take the jobs that should rightly go to South African citizens (Kotecha et al., 2012b:78). These perceptions have manifested in the spate of xenophobic attacks that plagued South African society in recent years. For example, a senior professor, from the School of Management, Information Systems and Governance (SMIG) at UKZN wrote a letter to the the Minister of Higher Education asking him to “stop the marginalisation of South African born academics” (Ngcobo, 2013:1). University management, in the form of Dr. Mosai Mokaje was quick to respond to these allegations arguing that the UZKN was unaware of any complaints by black South African-born academics of harassment or unfair practice, he added that the university’s academic staff profile consisted of only 6% expatriate academics (Ngcobo, 2013:1).

In a recent quality of life survey carried out in the metropolitan district of Tshwane in Gauteng by the Gauteng City Region Observatory (GCRO), it was stated that “thirty-five percent of all respondents [South African citizens] said [we should] send all foreigners home now. Xenophobia is on the rise, especially in Tshwane” (SAPA, 2014:1). The GCRO is a

partnership between the University of Johannesburg (UJ), Wits, the Gauteng government, and the SA Local Government Association, who conducted the survey with more than 25 000 people to analyse the satisfaction levels with governance in the metropolitan area. Xenophobic attacks often occur in areas with poor service delivery; however, the alarming aspect of this survey is that Tshwane is an area where there is relatively good service delivery.

Restrictive immigration policies help fuel perceptions that migrants are not welcome in the country. This situation has been compounded by the issuing in March 2014 of a discussion document by the African National Congress of Peace and Stability that recommended radical methods to deal with immigration in SA (Jost, Popp, Schuster and Ziebarth, 2012:1). These restrictions would make it even more difficult for migrants to integrate effectively. Government departments often lack coherence in terms of managing this situation and this has resulted in contradictory policies and legislation that has led to frustration among many migrants when trying to integrate. In some areas of society, refugees and asylum seekers are allowed to be employed while in others they are not. These contradictions add to xenophobic sentiment as asylum-seekers might be viewed as being undesirable (Jost et al., 2012:1).

2.7 Conclusion

This chapter has presented an assessment of the academic mobility patterns within the global marketplace. It has further attempted to present the challenges facing higher education in the SADC region, of which South Africa is an integral part. The dynamic nature of the higher education context in Southern Africa as well as the incongruous politico-legal framework within which it is forced to work have placed severe restrictions on higher education managers to source the best global talent available. In its exploratory approach, within the higher education sector, this study is unique as it aims to focus on the inflows of expatriate academics into South African higher education, in terms of age, gender, qualification, country of origin and recipient university. As previously stated there is a paucity of empirical research on expatriate academics in South Africa to date and that is the focus of this study. In the next chapter, expatriate and self-initiated expatriation management literature follows in order to further situate the study in scholarship.

Chapter 3

Expatriate and Self-Initiated Expatriate Management Literature

3.1 Introduction

Businesses of today have taken on an international identity in order to remain viable in a highly competitive global market; this has led to an ever-increasing body of scholarship, classified as International Human Resource Management (IHRM) dedicated to traditional company backed expatriates and their experiences of their international assignments (Aycan, 1997; Black, Medenhall and Oddou, 1998; Carpenter, Sanders and Gregersen, 2001; Bonache, Brewster and Suutari, 2005; Collings, Scullion and Morely, 2007; Dickmann, Doherty, Mills and Brewster, 2008; Juhl and Fuglsig, 2009; Kang and Shen, 2013).

The contemporary literature on the management of expatriates has highlighted various reasons for the deployment of expatriates (Suutari and Brewster, 1999; Dowling and Welch, 2004; Collings and Scullion, 2008). Expatriates can be deployed for knowledge transfer, for grooming competent international managers, or for filling a position affected by skills shortages. Likewise, Suutari and Brewster (2003:1132) state that expatriates are used for several reasons: “to control foreign operations, to transfer the skills of the organization to the different business units, to promote effective communication between the foreign project and the corporate company, and to integrate and co-ordinate the activities of the business unit in line with the policies of the corporate company”. Dowling and Welch (2004: 69) distinguish five roles that expatriates play: “agent of direct control, agent of socialization, network builder, boundary spanner, and language node”.

Internationalisation has affected organisations across a wide spectrum of interests, including universities as previously stated. South African universities have not been left out of this equation. Due to the lack of skills in certain fields such as science and technology, an increasing number of expatriate academics are taking up positions at South African universities (Maharaj, 2011). In common with countries such as Canada, New Zealand,

Australia and countries in Asia (Altbach et al, 2012), South Africa has a shortage of academic professionals.

Contemporary expatriation literature examining other kinds of expatriates and their experiences in settings other than the traditional organisation is minimal in comparison to the vast body of literature that exists for traditional ‘company backed’ expatriates. This is unfortunate, since it is not clear the degree to which research findings regarding ‘company backed’ expatriates also are applicable to other kinds of expatriates such as ‘short-term flexi-patriates, overseas experience seekers, migrants and self-initiated expatriates’ (Suutari and Brewster, 2000; Peltokorpi and Forese, 2009; Richardson, McKenna, Dickie and De Gama, 2013).

For example, universities present a different organisational environment with different role functions than business firms. Academics perform different role functions, such as lecturing, engaging in research, administrative duties (such as marking of projects and tests), applying for research grants and performing consultancy work (Barry, Berg and Chandler, 2003:3). Therefore, one can conclude that academic work is very different to that of any other kind of work and the challenges expatriate academics face in the university environment is very different to those faced by expatriates in a business environment as mentioned in Chapter 2 of this study. In their intensive research on expatriate academics, Richardson and associates (2003, 2006 and 2008) stress the increasing importance of expatriate academics in contemporary economies. Moreover, they identify expatriate academics as highly educated people who possess special qualities and expertise in a particular field. From the same perspective, Jones (2000), and Williamson and Cable (2006) cited by Richardson and McKenna (2006: 8) define expatriate academics as “knowledge workers demonstrating a significant level of confidence in the portability and the transferability of their knowledge” and as such are classified as SIEs.

Therefore the current study seeks to add to the existing body of knowledge concerning other kinds of expatriates in a different organisational setting, an academic workplace known as a university. This will be done by using the pioneering work on expatriate academics by Richardson and associates (2003, 2006 and 2008) as a starting point.

This chapter, Expatriate and Self-initiated Expatriate Management, will be presented as follows:

- Traditional expatriates versus self-initiated expatriates

- A review of self-initiated expatriation literature
- A review of studies on expatriate academics
- Motives for expatriation
- The expatriation experience
- Strategies for effectively managing expatriates using HR policies and practices.

This chapter seeks to provide the background for the analysis of the following Aims and Objectives:

Aim 2: To explore the nature of the international career experiences amongst expatriate academics at UKZN

Aim 3: To evaluate the nature of the international career experience from the perspective of organisational stakeholders at UKZN

5. To determine the motivating factors that led to the decision to relocate among expatriate academics at UKZN

6. To investigate expatriate academics experiences of organisational and social support during expatriation at UKZN

10. To examine the challenges and opportunities associated with the management of expatriate academics as perceived by their academic line managers

11. To investigate the nature of the expatriation experience of expatriate academics from the perspective of HR specialists

3.2 Traditional expatriates versus self-initiated expatriates (SIEs)

Policy-makers, academics and organisations acknowledge that SIEs are precious international human resources that are of great value to organisations as well as economies (Dickmann and Baruch, 2011:36). A 2011 report by the United Nations Department of Economic and Social Affairs Population Division estimated that there were nearly 214 million people participating in international mobility. This signified 3.1% of the total world population in 2011. This report also forecasts that from 2010-2050, 96 million people would move from developing to developed regions (Al Ariss and Crowley-Henry, 2013:79). This mass mobilisation includes SIEs, who are an important international human resource for various reasons. These include, a good comprehension of local and international markets, languages and cultures as well as

they cost less when considering relocation costs, salaries and taxation (Doherty, Dickmann and Mills, 2011:595).

Howe-Walsh and Schyns (2010:260) define SIEs as “employees who decide to migrate to another country for work through their own volition and are not sent to take up an overseas assignment by their company”. This distinction is critical due to the differences between the motivation and experiences of these two groupings. Suutari and Brewster (2000:434) compared SIEs to traditional expatriates and found that they are different because of their personal background, employer-task related factors, their motives for relocating, repatriation preparations and compensation packages (see Table 3.1).

Firstly, in contrast to traditional expatriates, SIEs are responsible for their own decision to relocate and are not posted overseas by their organisation for a fixed period of time from 6 months to 5 years. Secondly, SIEs recognise their overseas experience as a path to self-development and do not follow the pre-determined career path of a traditional ‘company-backed’ expatriate (Howe-Walsh and Schyns, 2010). In contrast, traditional expatriates are motivated to participate in international assignments because of the perceived financial gain, vertical career progression and/or personal interest in international experience as this is frequently seen as a major advantage when seeking upward mobility to executive management positions in multinational organisations (Carpenter et al, 2001:493).

Table 3-1 Special characteristics of self-directed expatriates in comparison to expatriates

Individual variables	Slightly younger More singles More females Spouse work abroad more often
Employer and task related variables	Work more often in Europe, but also in other countries Foreign private companies or international organisations Project organisation typical Temporary contracts more typical Typically jobs lower on organisation structure, with expert-status Work less often in managerial and marketing functions Conflicts related to job descriptions less common
Motives	Interest in internationalisation more common motive Poor employment situation more common motive
Repatriation and future career	Typically company does not promise a job after repatriation Some have no plans to return Repatriation agreement less commonly made prior to departure Less optimistic that international experience is valued More willing to accept another working period abroad More willing to accept more permanent stay abroad
Compensation	Negotiations were easier High variations in net salary Overseas premiums and education/housing allowances less common Performance-based bonus less common Assignment and travel insurance less common

Adapted from Suutari and Brewster (2000:429)

In the next section, a review of the existing literature on SIEs is done in order to create a foundation upon which to build the current study and to identify the gaps that this study hopes to fill.

3.3 A review of Self-Initiated Expatriate (SIE’s) literature

Al Ariss and Crowley-Henry (2013) in an in-depth literature review of over 350 articles from the fields of social science, management and career and HRM literature, attempt to bring clarity to the confusion around the use of interchangeable terminologies used to refer to self-initiated expatriates such as migrants and SIEs in management literature. In Table 3.2, the characteristics and the profiles of SIEs as represented in management literature based on Al Ariss and Crowley-Henry (2013) study has been presented.

Table 3-2 Profiles of self-initiated expatriates in management literature

Characteristics	Profiles of Self-initiated expatriates
Country of Origin	Western Europe and USA (Crowley-Henry, 2012; Vance, 2005), France (Cerdin and Pargneux, 2010), Finland (Jokinen et al., 2008), United Kingdom (Richardson, 2006), Germany, Australia (Tharenou and Caulfield, 2010), New Zealand (Thorn, 2009), Lebanon (Al Ariss and Syed, 2011), India (Agulloand Egawa, 2009), and other regions from cross country studies (Bergh and Plessis, 2012). Less focus on Ethnic minorities (Berry, 2009; Al Ariss, 2010)
Gender	Men and women represented in the samples with an interest in understanding gender impact on expatriate experiences (Myers and Pringle, 2005; Tharenou, 2010; Selmer and Lauring, 2011a; Berry and Bell, 2011)
Education and Skills	Most of the studies focus on the highly educated and qualified individuals (Sutari and Brewster, 2000). They are described to be endowed with a career capital: know- how, social capital and motivations (Cao et al, 2012)
Job Positions	Top managers, executives, middle managers (Biemann and Andresen, 2010)
Organisations	Multinationals and medium size companies
Destination Countries	Japan, France, Italy, Saudi Arabia, United Arab Emirates amongst others
Description of the	
Context	Focus on the agency of SIE's and their ability to act (Doherty et al., 2011)

(Source: Al Ariss and Crowley-Henry, 2013: 81)

From Table 3.2 it becomes apparent that the context of many of the studies on SIEs has been those individuals from developed countries, like the European Union (EU), the USA, France, Australia, New Zealand, the UK, Germany and, to a lesser extent, individuals from developing countries like India, Malagasy and Lebanon, with little or no evidence of any studies on SIE’s from Africa or South Africa. The literature seems to indicate that most SIEs come from economically viable countries; it seems to be the intention to portray them as

being able to benefit from the freedom of choice they have to be internationally mobile. It would seem that this ease of movement is due to agreements of a socio-economic nature within certain trade zones, like the EU, the North American Free Trade Agreement (NAFTA) bloc, and between previous colonial powers and their colonies. This freedom of choice is critical to the definition of SIEs and therefore they are portrayed in the literature as being able to freely cross national and organisational boundaries (Tharenou and Caulfield, 2010; Doherty, Dickmann and Mills, 2011) and reiterates the freedom of choice concept in the engaging in a 'boundaryless career' which is a concept discussed in Chapter 4. This study aims to address a gap in the current literature by examining SIEs relocating to a developing country, that is, South Africa, from a variety of developing and developed countries and regions.

The SIEs studied in existing literature are tend to be the executive, in other words those occupying top management, executives and middle management positions (Biemann and Andresen, 2010:430). They are defined as possessing a variety of capital (education, professional networks and family support) and enjoying great prospects and options when they engaging in international careers and experience successful vertical mobility (Biemann and Andresen, 2010:431). This study aims to add to the existing body of knowledge regarding SIEs by examining individuals across all levels in academia, not only those in management and leadership positions.

In SIEs' careers, organisational and national boundaries have been presented as having no consequence to mobility. The independence and ease of mobility of this group of individuals have been metaphorically described as 'protean and boundaryless' (Carr, Inkson and Thorn, 2005; Briscoe and Hall, 2006; Inkson, Ganesh and Sullivan, 2010; Abele, Spurk and Volmer, 2012). This is related to changes in the characteristics of the employment relationship such as "location, mobility, patterns of flexibility and the psychological contract, and how careers evolve as an outcome of individual choice" (Rodríguez and Scurry, 2014: 191). In management literature, the boundaries to international career mobility have been predominantly discussed in migrant and immigration studies. But it is clear from Chapter 2, that in an African context, there are many boundaries that affect the freedom of movement, in other words, the ability to engage in a 'boundaryless career'. Quantitative studies have examined macro-contextual issues such as economic advantages for labour markets, indicators of educational and professional qualifications, unemployment, disability, self-employment and brain drain/gain (Al Ariss and Crowley, 2013:84). While in-depth

qualitative studies (Aycan and Eskin, 2005; Healy, Bradley and Forson, 2011; Selmer and Lauring, 2013a) have examined the career experiences of migrants in terms of gender and status as ethnic minorities; as these are viewed as factors influencing an individual's international career mobility (Al Ariss and Crowley-Henry, 2013:84). This study aims to examine the impact of macro-contextual issues like restrictive immigration and visa legislation, meso-level influences such as job and work environment challenges, organisational support, language and organisational socialisation and micro-level influences such as family concerns, socio-cultural adjustment and safety and security on the ability of self-initiated expatriates to have a successful international career experience.

The question of how to best manage self-initiated expatriates has not been explored in great detail, except for the theoretical contribution of Howe-Walsh and Schyns (2010). The current study aims to add to the paucity of studies on how best to manage SIEs by examine the challenges that expatriate academics, as SIEs face in terms of the South African context from a management perspective, that is from the perspective of HR specialists as well as their academic line managers. This is done in order to provide a more in-depth analysis of the macro-contextual, meso-level and micro-level influences that can make expatriation a positive or a negative experience for expatriate academics. This study also explores management's perspective on how expatriate academics are currently being managed and if there is anything management could do differently in order to improve their current practices and policies as soon SIEs will outnumber traditional expatriates in the global marketplace

Al Ariss and Crowley (2013) have examined studies on SIEs and found the following themes (see Table 3.3), namely, international career behaviours, adjustment to host country, the differences between traditional and self-initiated expatriates, differences in the motivation of traditional expatriates and self-initiated expatriates in their motivations to work abroad, career experiences of self-initiated expatriates, demographic profiles, reasons to expatriate and repatriate, gender issues in self-initiated expatriation and career patterns of specific groups of self-initiated expatriates. The majority of studies have adopted a qualitative methodology and have examined the variables associated with expatriation from the perspective of the individual undertaking an international career experience. By adopting a mixed methodology, this study aims to explore all levels of influence on the SIEs experience here at UKZN and SA.

Table 3-3 Themes on self-initiated expatriates in management literature

THEMES ON SIEs	
1	International Career behaviours (Agullo and Egawa, 2009)
2	Career strategies in self-initiating expatriation (Al Ariss and Syed, 2011)
3	Adjustment of self-initiated expatriates/repatriates to their countries (Begley et al, 2008)
4	How Sies and Aes differ with respect to their reasons for working internationally (Doherty et al, 2011) and regarding their career capitals (Jokinen et al, 2008), career aspirations and orientations and in what way their individual career strategies differ (Biemann and Andresen, 2010)
5	The relationship of job satisfaction and turnover intentions: Cross cultural training, protégé experience, peer support, and the cultural clusters of the home and the host countries (Bozionelos, 2009)
6	Boundaryless career experiences of the SIEs and their careers of their spouses (Eby, 2001)
7	Opportunities HRM can play in supporting the adjustment of SIEs to the new organization and culture (Howe-Walsh and Schyns, 2010)
8	Demographic profiles (eg. Marital status, gender) of SIEs (Selmer and Luring, 2011a, Selmer and Luring, 2011b)
9	Reasons to expatriate/repatriate explained by push/pull factors (Thorn, 2009; Tharenou and Caulfield, 2010); career outcomes for SIEs (Selmer and Luring, 2011a,b)

(Source: Al Ariss and Crowley-Henry, 2013: 84)

In the section below, an overview of the studies done using expatriate academics as their target population has been done, in order to identify the areas of focus covered by these studies and to situate the current study in the existing body of knowledge.

3.4 A review of studies on expatriate academics

At this stage it would be prudent to provide an overview of studies on SIE literature that have focused on expatriate academics as their target population.

Table 3-4 An overview of the studies done on expatriate academics in management literature

No.	Author/s	Title	Themes covered	Sample	Methodology
1	Richardson, J. (2000)	Experiencing Expatriation: A study of Expatriate Academics	Opportunity to expatriate, decision to expatriate, expatriation experience	30 British expatriate academics working in several different countries abroad	Qualitative: in-depth interviews
2	Richardson, J. and McKenna, S. (2002)	Leaving and experiencing: Why academics expatriate and how they experience expatriation?			
3	Richardson, J. and McKenna, S. (2003)	International experience and academic careers: What do academics have to say?			
4	Richardson, J. and Zikic, J. (2007)	The darker side of an international academic career			
5	Richardson, J. (2009)	Geographic Flexibility in Academia: A cautionary note.			
6	Henha, N.P. (2009)	Analysis of the perceptions of expatriate academics on the factors affecting their work performance	The influence of biographical profile, social and cultural adjustment, homesickness, language, organisational socialisation, and satisfaction with the policies and practices of the organisation with regard to salary, rewards and promotion on the work performance.	85 Expatriate academics working at the University of Kwazulu-Natal, South Africa	Quantitative: Survey
7	Maharaj (2011)	The impact of globalisation on South African higher education institutions: Patterns of academic inflow into the South African higher education system	Inflows of Expatriate academics into South African higher education system	Expatriate academics in South African higher education institutions in 2010.	Secondary data collection/records/reports
8	Froese, F.J. (2012)	Motivation and Adjustment of self-initiated Expatriates: The case of Expatriate academics in South Korea	Motivation to relocate, adjustment to host country and work environment	30 Expatriate academics in South Korea	Qualitative: In-depth interviews
9	Selmer, J. and Luring, J. (2013a)	Expatriate academics: personal characteristics and work outcomes	Personal characteristics: age, gender etc. and work outcomes: job satisfaction, engagement etc.	Expatriate academics from 60 countries employed in 35 universities in 5 northern European countries	Quantitative: Survey
10	Selmer, J. and Luring, J. (2013b)	Cognitive and affective reasons to expatriate and work adjustment of expatriate academics	Work adjustment, reasons to expatriate, motivation		

Firstly, the study contributes to the body of scholarship of SIEs and expatriate academics, as there are very few studies in this area as seen in Table 3.4. Secondly, as far as it is known, the current investigation is one of only two studies targeting expatriate academics at UKZN in South Africa. In a quantitative study by Henha (2009) the perceptions of expatriate academics of factors affecting their work performance at UKZN was examined. Therefore, this study adds to the body of knowledge regarding expatriate academics in South Africa and particularly at UKZN.

Thirdly, Selmer and Luring (2013) conducted a large scale quantitative study replicating the work of Richardson and associates on expatriate academics from 60 countries employed at 35 universities across 5 countries in Northern Europe who were employed in the science field. This study examined the reasons to expatriate and the work adjustment of expatriate academics. The current study focuses on expatriate academics at a single university, that is, UKZN, in South Africa across all disciplines and examines their reasons for relocating and their career orientation. It also examines the challenges experienced during expatriation both from an individual perspective as well as that of the university management.

The current study and Selmer and Luring's (2013b) study are similar in that both use Richardson's pioneering work as a point of departure to design their survey responses around the expatriate academics reasons to relocate. Fourthly, the important difference between the two studies is that, the current study adopts a case study design, based on literature on SIEs (Mayrhofer, Meyer and Steyer, 2007; Singh, Ragins and Tharenou, 2009; Cappellen and Janssens, 2010; Rodriguez and Scurry, 2014) where the importance of context in a study of the motivation for relocation and the international career experience was established, therefore a case study design was adopted for the current study.

While a few studies have used expatriate academics as their sample, each has focused on different aspects such as reasons to expatriate, work performance, work adjustment and the experience of expatriation separately or in conjunction with each other. This study aims to fill a gap in the scholarship by using a mixed methodology to examining the international career experience of expatriate academics both from an individual as well as a management perspective by interviewing their immediate line managers as well as the HR specialists responsible for managing expatriate academics at the university. It also aims to add to existing scholarship on SIE literature by determining the career orientation of expatriate academics in order to enable management to have a better understanding of how it can assist individuals have a positive career experience at UKZN. Another critical factor for management to consider is the individual's motives for relocation which will be discussed below.

3.5 Motives for expatriation

The motives for accepting an international assignment vary from individual to individual. The following figure (Figure 3.1), once again based on the Stahl, Miller and Tung (2002) study, suggests that several characteristics of an individual, such as job skills, motivational state, language skills, relationship skills, personal career and financial goals and family, all determine the expatriates' expected level of success in their international assignment. Fee and Karsaklian (2013) concur with these findings and suggest that it would be prudent for an organisation to take into consideration the expatriate's motivations and the characteristics of a potential expatriate manager. Thus challenges in effective management of expatriate managers include proper expatriate selection and training, bearing in mind the needs and motives of the individual.

The selection process should be designed to enhance the development of actual and potential expatriate managers of organisations. However, some critical factors, such as the cost of expatriate recruitment, finding domestic managers with the right skills set and traits to be a successful expatriate, and training the family of an expatriate for a cultural shock, remain the major challenges in the management of expatriate selection (Stahl et al 2002; Fee and Karsaklian, 2013).



Figure 3-1 Motives for accepting an international assignment

Adapted from Stahl et al (2002:145)

It is important for HR to understand the individual's motivation to move because it would better equip the company to provide the kind of support needed to attract and retain highly skilled talent globally (Fee and Karsaklian, 2013). Previous research regarding the highly skilled tended to highlight the motives for international mobility of those on expatriate assignment, that is, traditional expatriates, essentially disregarding the potentially larger population of those who choose to be internationally mobile of their own accord. There have been several authors that have requested more information on the motives of self-initiated expatriates (Banai and Harry, 2005; Bonache, Brewster and Suutari, 2005; Tharenou and Caulfield, 2010), emphasising the paucity of information and insight into self directed international career mobility that is now a widespread occurrence (Boanche et al, 2005:12). Jackson, Carr, Edwards, Thorn, Allfree and Hooks (2005); Richardson (2009), Froese (2012) and Selmer and Luring (2013b) have been some of the few researchers who have answered this call in their work with academics, as well as Thorn (2009a,b), who looked at other professionals. These works have been discussed below as this forms the foundation for the questions raised in the instrument used in this study.

Questions have been raised as to why people choose to participate in international mobility. Previous research has been characterised by 'haphazard and simplistic views of motivation' (Thorn, 2009b:5), primarily focused on the financial benefits. Ackers (2005) suggests that there are a variety of factors that influence an individual's motivation to move from one country to another. He also suggests that the 'menu and significance of factors might change over time as careers develop and lives evolve' (Ackers, 2005:106).

Jackson et al, (2005) in their study of SIEs from New Zealand living overseas found 25 factors that impacted on a decision to be mobile. The authors undertook a principle components analysis and identified five key motivators for mobility, namely, economics, career, family/extended family, lifestyle and culture (Jackson et al, 2005:113). Thorn (2009b:18) also added another motive, which is the political environment.

Thorn's (2009b: 449) study indicates that the principle motivations for mobility, three are related to career, three related to cultural and travel opportunities and two each that are related to economic and relationship motives. In addition, the opportunity for travel was rated as the single most important sub-motive. Furthermore, adventure and a desire to experience a variety of cultures are other cultural sub-motives that received a high ranking. Only two of the motives could be influenced by external environment, namely, seeking better remuneration and for an improvement in one's economic situation. Thorn (2009b) argues

that these can be influenced by a government interested in stemming the loss of human capital or attracting scarce human capital. In addition, she suggests that other motives are of a more personal nature, and therefore there is little a government or organisation can do to influence them.

In Thorn's (2009b:452) study, in terms of ranking, "cultural and travel opportunities were first (29.2%), followed by career (26.2%), political environment (1.9%) and quality of life (5.6%)". She found a clear distinction between men and women, with women ranking cultural and travel opportunities higher than men. Career and economic motives were more important to men, as are the quality of life and political environment motives (Thorn, 2009b). In addition, career as a motive seems to be the most important to those relocating to Africa, who explained that they have gone to Africa for new career challenges, advancement opportunities and professional development.

For the respondents in Thorn's (2009b) study, career opportunities combined with adventure and potential travel opportunities were the main motivators. Her findings regarding differences in life stages for men and women indicate that, for single young men, cultural and travel opportunities are major drivers, with relationships, quality of life and political environment being of low priority. She found that differences between men and women in their 40s are clearer, with men's priority on career and women's on relationships. For men and women in the 50+ age category, career was the top priority for men then economics while for women the top priority relationships followed by the increasing importance of the quality of life motive (Thorn, 2009: 455). Even though Thorn's (2009b) study was based on the investigation of the motives for expatriation of highly skilled SIEs from New Zealand, it did not inform the design of the current study as Richardson (2000) was used as a point of departure because it examined the target population of the current study, that is expatriate academics.

Osland's (1995) study of the expatriate assignment identified the motive behind expatriation as the notion of a 'hero's adventure', a concept which Richardson and McKenna (2002) also identified as one of the key motivators of the decision to expatriate; Richardson calls this the 'explorer'. Richardson and McKenna (2006:6) like Osland (1995) used a qualitative methodology (in-depth interviews) in order to present an in-depth description of the subjective experience of expatriation. The motives for expatriation identified by Richardson and McKenna (2002) were used to inform the design of the questionnaire used in the current study.

Richardson and McKenna (2002:67) use four metaphors relating to ‘motivations to go’ to become an expatriate. These are as follows:

- *Explorer*. This metaphor suggests that, for many expatriate academics in this study, the choice to undertake international mobility is more about personal fulfilment and development rather than career advancement.
- *Refugee*. Many respondents in the Richardson and McKenna (2002:71) study stated their intention to ‘escape Britain’. While the reasons varied, there was a general consensus that they were motivated by a search for a better quality of life either personally or professionally, in other words, escaping a bad relationship, situation or experience and starting fresh in another country where they could reinvent themselves. In this respect they felt that they were proactive as they independently sought positions overseas. Thus demonstrating a self-directed career management attitude further explained in Chapter 4.
- *Mercenary*. While a relatively small number of participants “explicitly identified money” as a key driver to expatriate (Richardson and McKenna, 2002: 70), this remains the traditional conception of why expatriates relocate. Interestingly, participants of Richardson and McKenna’s (2002:67) study commented that “certain countries became more or less attractive according to the potential salary that might be offered”. Once the salary matters had been resolved, living conditions became an issue; for example, there were some who were willing to put up with discomfort in Saudi Arabia, that is, the severe restrictions on the way of life there. Some participants complained that they were actually earning less than they had in Britain. This would also seem to be the case in South Africa, as only those from countries less economically viable would find the salaries here more attractive.
- *Architect*. Only one participant in Richardson and McKenna’s (2002) study identified career building as the motivation to expatriate. However, it became apparent that this became an important issue to participants once engaging in the international career experience. The activities and projects undertaken during the international career experience served to enhance their future career prospects. This was the case particularly when participants worked in countries and institutions with good reputations and were highly respected. Working at an institution with a good reputation was critical in improving the marketability of the expatriate academic.

Richardson and McKenna (2003:774) study revealed that self-initiated expatriates were not motivated by traditional influences, but were motivated by travel and the opportunity to engage adventure. Participants in this study used “hero talk” when describing how they overcame challenges by “fighting to survive”. The majority of participants attributed this partly to the lack of strong systems by the host institution. It would seem that this lack of support served two purposes, firstly academics had to make the best of the situation and secondly, by doing so actually found themselves discovering their true selfs. (Richardson and McKenna, 2003:781).

Richardson’s (2005) study found that the family played a role in the decision to expatriate. Richardson’s study (2005) showed that family matters played an important role in the academics’ decision to expatriate; this was in contrast to the study by Inkson, Pringle and Barry (1997).

Froese (2012) used a qualitative study to analyse the motivation of expatriate academics to relocate to South Korea. According to participants in the study, disciplines like humanities and social sciences are characterised by a highly competitive labour market and securing tenure is extremely difficult; therefore, when offered posts in South Korea, they willingly accepted. Thus the labour market situation was an important motivation (Froese, 2012). The decision to use Richardson’s (2000) study as the departure point of the study had already been taken in 2011; hence Froese’s (2012) study was used to corroborate these motives for use in the current study. The model adopted by Froese (2012) explained the relationships he discovered between three types of motivators and the adjustment (Work, general and interaction) of expatriate academics to their new environments. Those academics who were primarily motivated into relocation by their families were more satisfied with their general and interaction adjustment. Those with a regional interest, in South Korea were reportedly more likely to be satisfied with all aspects of adjustment as they were knowledgeable about the country, its culture and customs. Those that were driven by poor labour market conditions in their home countries were less satisfied with work, general, and interaction adjustment as they lacked the family support as well as the appreciation of local culture and customs.

Suutari, Tornikoski and Makela, (2012) investigated the motives for international relocation amongst SIEs and have suggested that this is primarily associated with motivational, intangible and non-financial rewards such as adventure, seeking new experiences, a personal

desire for travel and a general quest for “a fantasy of the global” (Suutari et al 2012:3456). These perceptions have led to the problematisation of the group and their being viewed as being uninterested in organisational commitment or loyalty. In a large scale, quantitative web-based study, Doherty et al, (2011) also investigated the issues related to the decision to expatriate, comparing the motivations of SIEs to those of traditional expatriates. Their results illustrated that location and host reputation motives were of significant importance to SIEs and that traditional expatriates placed more emphasis on job, skills and career impact.

Fee and Karsaklian (2013) analyse the motivations of international volunteers as SIEs. They compared the motivations for expatriation among assigned expatriates (AE), or traditional expatriates, SIEs who are company based and international volunteers. They discovered that SIEs’ motivations to expatriate were the result of a combination of the above motivations, rather than revealing one dominant motive. In the review carried out here of studies on the motivation of SIEs to embark on international career experiences, it was found that the majority of studies used a qualitative approach in order to gain a deeper understanding of the drivers of SIEs. In contrast, this study is similar to those of Thorn (2009b) and Selmer and Luring (2013b) who used a quantitative methodology to identify dominant drivers to expatriate among SIEs. The current study also aims to use a quantitative methodology to empirically identify and rank the motives for undertaking international mobility among a unique sample of expatriate academics in South Africa, which fills a substantive gap in the body of scholarship.

Similar to the findings of Thorn (2009), Selmer and Luring (2013) found that expatriate academics may have more than one reason to expatriate, which can loosely be organised along the lines of ‘push and pull factors’. For example, “a person may want to escape a workplace where their academic efforts do not pay off in the form of promotions or recognition” (Selmer and Luring, 2013b:176). Academics have high social capital and valuable homogenous skills much needed in society today, as a result, academic staff are in a position to be very selective regarding their decisions to join particular institutions as their skills set is scarce and easily transferable (Nordenflycht, 2010). Therefore, HR departments at universities are finding it increasingly difficult to manage this scarce human talent. Some issues raised by researchers have been the lack of integration of female expatriate academics into university leadership positions (Skachkova, 2007), the debatable teaching credibility of the expatriates as well as poor integration with their peers and other members of the academic community. Selmer and Luring (2013b) and Nordenflycht (2010:154) argued that exploring

the motivation of expatriate academics to relocate helps universities gather important information on how best to prepare for their effective and efficient management.

Expatriate academics may be motivated to relocate internationally to achieve future goals or perhaps because they see expatriating as a goal in itself. Psychological decision research has primarily concentrated on the “cognitive processes underlying human choices and a developing pool of research with a multidisciplinary approach suggests that affective processes may indeed play an important role too” (Pham, 2007:155). The contrast between cognitive-driven and affective-driven decision-making has been defined as extrinsic and intrinsic motivation respectively (Kobbeltveldt and Wolff, 2009:567). For that reason, the tension between cognitive- and affective-driven behaviour and its outcomes is the “most important distinction from a time perspective related to ongoing activities and their consequences (Kobbeltveldt and Wolff, 2009:569). Thus one can conclude that expatriates choosing to go abroad for cognitive reasons maybe be better psychologically equipped to cope with stress and hardships facing them than their affect-driven colleagues. This is important to this study as literature in Chapter 2 has suggested major challenges that SIEs experience in the African and SA contexts.

Using Kobbeltveldt and Wolff (2009) study to categorise Richardson and McKenna’s (2002) reasons to expatriate would put the ‘architect and mercenary’ metaphors into the cognitive-driven reasons category, while the ‘explorer and refugee’ metaphors would fall into the affect-driven category. Selmer and Luring (2013b) found that one of the affect-driven motives to expatriate, that is, ‘refugee’ reasons (life change/escape), had a negative influence on work adjustment. They also found that the other affect-driven reason, that is, ‘explorer’ reasons together with cognitive-driven reasons (‘architect and mercenary’), did not affect the expatriate academics adjustment to their work environment. The study has useful implications for university recruitment. HR may want to find out why academics are coming to work there as an additional hiring criterion, as those with refugee reasons may find it more difficult to adjust effectively and efficiently to their jobs (Selmer and Luring, 2013b). The current study will use the model suggested here by Selmer and Luring (2013b) to identify if the reasons for expatriation of respondents in the study are indeed more likely to be able to enable them to deal with the challenges they face during the expatriation experience.

3.6 The expatriation experience

Recent research in international human resource management (IHRM) literature has focused on the value of an international career to the individual, unlike previous research which has examined the international career experience from an organisational perspective. In professional careers, individuals are expected to pursue an ‘intelligent career’ connected to three types of knowing, namely knowing-why, knowing-whom and knowing-how (Jokinen, Brewster, & Suutari, 2008). These three forms of knowing are essential to the development of ‘career capital’ in other words, the resources that an individual has in order to advance their careers.

‘Knowing-why’ refers to why individuals work, which is related to their values and interests. ‘Knowing-whom’ refers to networking, defined broadly, including professional and personal relationships. ‘Knowing-how’ refers to the skills and competencies employees can offer to internal (their organisation) or external labour markets (Cerdin and Brewster, 2014). Developing ‘career capital’ is especially significant for expatriates, because whatever the purpose of their international assignment, it creates the basis of their employability. Career anchors, which are an aspect of the ‘knowing-why’, reflect a person’s values and interests in terms of career orientation, and consequently add to expatriate success both during the expatriation and the repatriation phase (Cerdin & Le Pargneux, 2009). ‘Knowing whom’ is also a vital component of ‘career capital’ building, both internationally and locally, as it helps individuals to achieve their career goals and be successful in their careers (Yan, Zhu, & Hall, 2002). Network-building plays a strategic role since expatriates can act as ‘boundary spanners’ (Makela, Kansala and Suutari, 2011) by assisting an organisation in creating social networks and exchanging knowledge. ‘Knowing-how’ represents the skills and competencies that individuals can present to an organisation. The development of career capital is further explored in Chapter 4.

This is why research on expatriation selection has focused on the soft skills related to cultural adjustment. Technical expertise is compulsory but not enough. Recent research focuses on intercultural skills, such as a ‘global mindset’ (Levy, Beechler, Taylor and Boyacigiller, 2007) or ‘cultural intelligence’ (Earley & Ang, 2003; Thomas & Inkson, 2004). Thomas, Elron, Stahl, Ekelund, Ravelin and Cerdin (2008:127) describe “cultural intelligence as a system of interacting knowledge and skills, linked by cultural metacognition, that allows people to adapt to, select, and shape the cultural aspects of their environment”. Other

definitions have been proposed, such as the one coined by Earley and Ang (2003), which includes a motivation aspect. Even though differences exist in the way cultural intelligence is defined, researchers agree on the fact that it can be developed through various types of international experiences.

From a management perspective, international human resource management (IHRM) literature has concentrated on expatriate failure-which has traditionally been defined as “the premature return of an expatriate manager to his or her home country” (Lee, 2007:403). Notwithstanding that there is uncertainty about the true rate of failure (Brookfield, 2012:1) reports that “between 4-6% of all international assignments fail in any given year”. Failure or a negative expatriation experience can be the result of “a pre-mature return, inability to achieve objectives of the tasks at hand, sub-par work performance, host-country adjustment problems or repatriation turnover” (Thomas et al., 2005:340).

The implications of the failure of an international job posting include: a drop in productivity, strained relationships with host-country nationals, recruitment and replacement costs of personnel, loss in profits, decreased staff morale in the host-location and damage to the organisation’s reputation and brand particularly in developing markets (Bhaskar-Shrinivas, Harrison, Shaffer, and Luk, 2005:257). Not only do failed assignments have negative consequences for the organisation but they can also affect the expatriate’s personal well-being, in terms of poor self image, loss of status and respect amongst co-workers, diminishing psychological contract, family problems, disruption of vertical career progression (Shaffer ,Harrison, Gregersen, Black and Ferzandi, 2006:109; Ernst and Young, 2010; Al Ariss, Vassilopoulou, Ozbilgin and Game, 2013).

In any event, failed assignments or a negative expatriation experience can produce a ‘ripple effect’ that can negatively impact both the organisation and the individual for a number of years, by contributing to increased barriers to mobility and a reduced willingness to expatriate amongst individuals considering international careers (Cole and Nesbeth, 2014). The reasons for negative expatriation experiences are many, but can be classified into four categories: job and work environment challenges, family and lifestyle challenges, organisational support and contextual challenges in the host country (Cole and Nesbeth, 2014; Lazaroova and Pascoe, 2013). These can further be categorised into macro-contextual level, meso-level and micro-level challenges (Al Ariss and Crowley-Henry, 2013):

- Macro-Contextual: Contextual challenges in the host country

- Meso-level: Job and work environment, organisational support
- Micro-level: Family and Lifestyle challenges.

Al Ariss and Ozbilgin (2010) argue that by recognising the contextual nature of careers, it is possible to gain a deeper understanding of international careers in their relevant geographical, historical, institutional and organisational settings. Al Ariss and Crowley-Henry (2013) have proposed that the model used in the study of migrants (See Table 3.5) should be adopted in the studies of self-initiated expatriation.

Table 3-5 Key levels of research on self-initiated expatriation

Broad levels	Specific themes
Macro-context	Regional/national legislation/policies/guidelines on the employment and work of SIE's, country(ies) of origin/destination(s), discriminatory and anti-discriminatory policies, diversity policies, unemployment settings, formal policies of recognition of education and skills of SIE's.
Organisational level	Human resource Management strategies for SIE's, discrimination practices against SIE's, diversity strategies/practices for accommodating SIE's in organisations, human resource development strategies.
Individual level	Agency of SIE from minority groups, work-life experiences of SIE's from minority groups, strategies for leaving a country for another, strategies for overcoming structural barriers in the destination country, experiences of SIE's in terms of their ethnicity/religion/sex/age/physical abilities among other characteristics, link between experiences in the home and destination country.

(Source: Al Ariss and Crowley-Henry, 2013:88)

If this model were applied to the international career experiences of SIEs, the macro-contextual level would apply to the role of institutional interventions, as well as social, political and economic factors that limit or enhance their careers. The meso-organisational level would take into account how the organisations shape the careers of the SIEs and the micro-level would refer to the subjective work-life experiences of SIEs (Al Ariss and Crowley-Henry, 2013). This study uses the model above in order to explore the expatriation experiences of expatriate academics at UKZN, a university in South Africa, in terms of macro-contextual level, meso-level and micro-level influences on the expatriation experience. Therefore this study contributes new knowledge to the field of SIE research, by applying a model previously used in migration research.

3.6.1 Macro-contextual level challenges faced by expatriates during expatriation

A macro-contextual level analysis of the challenges faced during expatriation, as suggested by the model above, has been provided in Chapter 2, under the following sections:

- 2.3 Challenges facing Higher Education in the Southern African region

- 2.5 Skills shortages in South African Higher Education
- 2.6 Policy environment, regulations and immigration practices in South Africa.

In any event, recruitment policies have to be in line with labour legislation in South Africa. Thus, the policy at UKZN states that “[a]ppointable designated group candidates, South African citizens and permanent residents shall be granted preference for vacant posts at the University” (UKZN, Recruitment Policy, HRE/04/08/CO, 2002). Designated groups are defined in the Employment Equity Act (1998) as “Black people (i.e. Africans, Coloureds and Indians), women and people with disabilities who are natural persons and are citizens of the Republic of South Africa by birth or descent” (Employment Equity Act 55 of 1998, Republic of South Africa). Expatriates do not count in an organisation’s Employment Equity Plan, in terms of the law, therefore organisations need to carefully weigh the benefits of hiring them. Therefore human resource managers have firstly to try to source South African candidates; if after a pre-determined period no suitable South African candidate has been found, then and only then can they recruit expatriate academics. In any event, it is clear, that despite political and public rhetoric to the contrary, the legislation in South Africa remains a barrier to the smooth integration of foreigners into South African society; it is this knowledge that will help to analyse and interpret the data in this study in an illuminating way.

South Africa’s immigration practices are restrictive, despite the country’s crippling skills shortages, very little has been done to make it easier for organisations to recruit foreign talent. This is not an isolated case. Al Ariss (2010) examined the macro-level contextual barriers that Lebanese SIEs experience through the immigration policies in France. These too are highly restrictive and discriminatory towards non-French nationals who have also come to help France overcome their skills shortages. Some policies include selective immigration practices when delivering work permits to non-European Union (EU) citizens (Al Ariss, 2010). For example, skilled professionals in the medical, legal and public sector have to hold French citizenship or go through complex selection procedures in order to practice (Al Ariss, 2010). Richardson (2009) also found similar practices in Canada.

In a study by Rodriguez and Scurry (2014), the career experiences of SIEs in Qatar were examined. Macro-level contextual analysis revealed that because of a restrictive localisation policy (Qatarisation) in Qatar, SIEs are not offered any development opportunities nor are they given promotion opportunities as these are reserved exclusively for local Qataris. They restricted to a three year temporary work visa; and therefore always have the identity of being

‘temporary migrants’, and as such are unable to change their status from that of being an outsider, thereby being unable to integrate fully into Qatari society or to develop social and professional networks (Rodriguez and Scurry, 2014). This adds to the feeling of isolation and dislocation felt by many SIEs in Qatar. This finding has significant implications for the development of the ‘knowing whom’ competency, as limited access as a temporary migrant hampers the development of social networks, therefore restricting their proximity to those who can provide opportunities and important resources (Rodriguez and Scurry,2014). This might also prove to be the case in SA.

In Qatar, also, SIEs have been recruited to overcome the shortage of skills in the country and are seen by Qataris as experts in their fields, the expertise being in stark contrast to the local workforce. In line with the localisation policy in Qatar, SIEs are expected to convey skills and knowledge to the local workforce (Rodriguez and Scurry, 2014:200) but are not given the opportunity to develop themselves. This proved to be problematic as this was acceptable while they were in Qatar but it would impact on their employability once they left, due to increased age and lack of training. Their expertise can be described as a ‘double-edged sword’ as their value upon entering Qatar existed because of their expertise, but placed them at a disadvantage because of the limitations in investment of the development of career capital of in Qatar. Limitations were also placed on SIEs in terms of differences based on national and ethnic demographics when it came to promotion opportunities (Rodriguez and Scurry, 2014).

Other studies of SIEs have focused on the institutional and organisational barriers faced by ethnic minorities. For example, administrative barriers, such as visa and work permit authorisations imposed on migrants, are known to negatively influence their career choices and outcomes (Syed, 2008). In addition, organisations and institutions are able to discriminate against ethnic minorities (Laer and Janssens, 2011) and discredit their education and professional experiences, leading to their underemployment and even unemployment (Carr, 2010). Underemployment implies that the skills and qualifications of SIEs are being underutilized in posts that do not require such a high level of expertise. For example, in the USA, Bell, Kwesiga and Berry (2010) highlight the discrimination, exploitation and abuse of low-skilled Hispanics. Notably, the majority of studies are carried out in a single country setting, rather than a comparative setting, likewise, this study too is carried out in a single country setting. In any event, this points to the direction of future research in the African

continent, by conducting comparative research between different countries and perhaps even different institutions, nationally and internationally.

3.6.2 Meso-contextual level challenges faced by expatriates during expatriation

Existing literature on expatriate management has revealed that expatriation can be a highly stressful experience for individuals who have to deal with a new way of life and who have to perform in an unfamiliar work environment. Black and Stephens (1989) have classified expatriate adjustment into three distinct categories:

- General adjustment is the process by which the expatriate acquaints themselves with the new host country environment and familiarizes themselves with the local surroundings (Henha, 2009).
- Interaction adjustment is the process through which the expatriate familiarises themselves with and comfortably interacts with the host country nationals. During this process the expatriate learns to correctly interact with locals at work and in the community and builds relationships with local co-workers in order to build task performance (Bhaskar-Shrinivas et al, 2005).
- Work adjustment refers to the process through which the expatriate becomes comfortable and familiar with their work values, expectations and standards in their new work environment (Froese, 2009). During the work adjustment process an expatriate has to adapt to their new job responsibilities, new performance standards and to the type of job role they are expected to fulfil (Henha, 2009).

International human resource management (IHRM) has been dominated by the study of traditional ‘company-backed’ expatriates, while studies on those individuals undertaking international career mobility of their own volition are minimal in comparison. SIEs are a valuable international human resource, and yet an almost hidden aspect of the international labour market. Therefore it is useful to examine the current body of literature in order to determine whether SIEs experience similar challenges to those experienced by traditional ‘company backed’ expatriates.

3.6.2.1 Job and work environment challenges

Expatriates can experience frustration and anxiety over many job related issues such as role ambiguity and role novelty as forecasters of adjustment, job satisfaction, performance

outcomes and turnover intentions, predominantly in relation to compensation, career development and promotion opportunities (Stahl, Chua, Caligiuri, Cerdin and Taniguchi, 2009:89). McNulty, De Cieri and Hutchings (2013) found that organisations that did not pay attention to career development resulting in expatriates seeking other employment opportunities in lieu of their negative perceptions of their current position.

Van der Heijden, van Engen and Paauwe (2009:831) concluded that expatriates value organisational career support more for the attention the organisation shows to them than the actual transition, benefits and development opportunities gained. The consequences of poor selection practices cause a lack of ‘person-organisation fit’ amongst the strategic purpose, objective of the assignment, and expatriate skills and abilities (for example, language expertise relevant to the location, interpersonal skills and spouse and family considerations) resulting in a poor expatriation experience for both the incumbent and the organisation (Cole and Nesbeth, 2014:68). In fact, Mercer (2011:14) found in its *2011 Worldwide Survey of International Assignment Policies and Practices* that 62% of companies’ rate poor selection practices as the leading cause of expatriate failure.

3.6.2.2 *Organisational support*

Social support was defined as “the relationships at work that can enhance the coping abilities of the recipient” (AbuAlRub, Omari and Al-Zaru, 2009:362). According to AbuAlRub et al. (2009:329) nurses who identified themselves as having more social support from their line managers and colleagues reported higher retention intent in both public and private hospitals. Studies have also stated that good communication with supervisors and peers is positively associated with intention to stay in a job (Chen, Chu, Wang and Lin, 2008; El-Jardali, Dimassi, Dumit, Jamal and Mouro, 2009). In addition, Chen et al (2008) expressed that a low score for quality of teamwork was associated with higher intention to leave. Chan, Tam, Lung, Wong and Chau (2013:279) stated that positive working relationships were negatively related to intention to leave, as it served to reduce conflict.

The types of organisational support typically provided to expatriates and their families from organisations include “pre-assignment visits to the host country, furniture removal, financial advice, temporary accommodation, real estate assistance, language and cross-cultural training and immigration assistance” (KPMG, 2013:14; Van de Heijden et al, 2009). Many organisations focus on the administrative support it can provide during international relocation but lesser consideration is given to the professional and social skills needed for

successful adjustment of the expatriate and their families to the new host location (McNulty, 2012).

Support in terms of “professional and social skills include such considerations as job search assistance, career counselling, work permit assistance, introductions to other expatriates, memberships of sports or recreation clubs, information about access to expatriate forums and spouse networking groups” (Cole and Nesbeth, 2014:69). Providing organisational support in these areas can enhance the success of the expatriation experience for both the individual and the organisation (Chan et al, 2013). Organisations that do not engage in this kind of support can by omission send a message to the expatriate and their families about the extent to which their contribution is valued and the extent of concern regarding their well-being which in any event will impact on the employee’s commitment to and intention for turnover towards the organisation (Cole and Nesbeth, 2014; McNulty, 2012). Cole and Nesbeth (2014) found that the most common reason for the failure of expatriate assignments from the perspective of the family was inadequate organisational support during all phases of the experience. This contradicts previous studies (Ballout, 2008; McNulty, 2012) that found that family matters were the most significant cause of expatriate assignment failure.

3.6.2.3 *Language*

Communication is critical to the successful facilitation of business relationships between people and organisations. Therefore, “proficiency in English, including speaking practices, may promote the adjustment of expatriates, not only by improving their direct communication with host nationals, but also by making their interactions in English more effective” (Bhaskar-Shrinivas et al, 2005:263). The problem in South Africa is that because of our diverse culture, English is often the second or even third preferred language of communication amongst host country nationals. Even though English has been adopted as the official medium of communication in professional settings, expatriate academics and expatriates in general not only have to be able to speak English, but speak and understand it in a uniquely South African context. Language barriers have often been cited in management literature as being one of the main reasons for the ‘culture shock’ experienced when they first come to their new host country (Tungli and Peiperl, 2009; Peltokorpi and Froese, 2009). If expatriates find themselves in a country where their home language is not spoken, they will have problems communicating with their peers and colleagues. This affects their ability to

settle down during the initial stages of adjustment to the new host country because of difficulties in simple situations like driving, shopping and socialising (Henha, 2009).

Marquis and Huston (2014:19) assert that effective communication is critical to the success of an organisation. This allows for the transmission of the organisation's vision, the creation of employee commitment, enhancement of process improvement, and promotes business outcomes by altering employee behaviour. Local language ability is a critical factor for effective performance, this leads to increased satisfaction, enhanced work performance and decrease staff turnover (Henha, 2009). Selmer (2006:347) explains that knowledge of the host language serves to enable communication with colleagues, superiors and subordinates, facilitate a deeper understanding of organisational culture and allow for correct social and professional etiquette. This is why language training is usually part of the preparation of expatriates for an international assignment. In fact, according to the KPMG (2013:16) *Global Assignment Policies and Practices Survey*, 41% of all participants said that language training was part of their company's standard policies on expatriation.

3.6.2.4 *Organisational socialisation*

Socialisation describes the process by which individuals learn how to fit into a new organisation, by learning about what is appropriate in terms of attitudes, behaviours and knowledge associated with a particular role in an organisation (Cooper, Anderson and Cash, 2012:43).

The term socialisation usually applies to newcomers in the organisation, but considering that expatriates are from other countries they too can be considered newcomers, not necessarily to the organisation but to the host country (Milligan, Margaryan and Littlejohn, 2013). Organisational socialisation has been defined by Albrecht (2001:216) as "the process by which an expatriate is inculcated with the values, expected behaviours, social knowledge and other important features of the host country organisational setting". In expatriate management terms, this implies that the purpose of organisational socialisation is to familiarise the newcomer with the new environment, thereby reducing anxiety and frustration and guiding the expatriate on what is appropriate behaviour and acceptable cultural norms according to the cultural context of the new host country (Henha, 2009; van der Heijden et al, 2009).

Employees who are well socialised are more committed to their jobs, learn faster, are more satisfied with their jobs and are more likely to build successful careers within the organisation (Milligan et al, 2013; Chan et al, 2013). Any kind of orientation and support that they receive from their organisation and their colleagues is likely to ease their work and socio-cultural adjustment.

3.6.3 *Micro-level challenges*

Micro-level research on SIEs have focused on work-family balance conflicts of SIEs from minority groups, reasons for relocating, strategies for overcoming meso- level challenges in the host country, experiences of SIEs in terms of their ethnicity/religion/gender/age/physical characteristics amongst others, and connecting the home country and host country experiences (Al Ariss and Crowley, 2013:88). A major area of focus in expatriate management studies has been on the role of the family and spouse in the success or failure of an international assignment ((Black and Gregerson, 1999; Andreason, 2003; Richardson, 2005; Dupius, Haines and Saba, 2008).

3.6.3.1 *Family concerns*

Family concerns have been identified as one of the major causes of expatriate failure for at least the last two decades. The influence of the family and/or spouse not being able to adapt to the new living and cultural environment of the host country and its impact on performance as well as premature return is a dominant theme in the literature (Dupius et al, 2008; Lazarova, Westman and Shaffer, 2010; Makela et al, 2011). Recent research (Cartus and Primacy, 2010; Brookfield, 2012:13) has reported that “family concerns, partner dissatisfaction, and the inability of the spouse to adjust are all causes of assignment failure, with the adjustment of the spouse emerging as a critical factor in the overall success of an overseas assignment”. McNulty (2012) found that the adjustment of the trailing spouse is multidimensional and socially constructed. Work-life conflict can lead to “feelings of negativity, marital conflict as well as dual career issues that directly influence an expatriate’s ability to perform at work (Makela et al, 2011:365).

Family members influence the expatriate in all aspects of expatriation. Throughout all phases, expatriates must consider the outlook of their families as their consideration for success in the new situation (Adler and Gunderson, 2008). The company, employee and family as well as their interrelationships are all important. Dupuis, Haines and Saba (2008) argue that each

facet of this relationship is equally important and have a strong influence over the other. Furthermore, they argue that the the dynamic nature of the world today demands a certain degree of stability at home, so that an employee to be able to perform suitably at work. A supportive family environment could be a stabilising factor during these uncertain times. (Makela et al, 2011).

In order to make up for the loss of personal interactions in the home environment, the social network in the host country needs to be developed from the outset so as to provide an ideal foundation for the time overseas (McLean, 2008:66). Due to the link between psychological well-being and family this loss could result in psychological instability that could cause job uncertainty and stress that will become a obstacle to adjustment (Osman-Gani and Rockstuhl, 2008:32). A sense of belonging can be found in groupings based on for example, nationality. People with similar cultural backgrounds tend to gravitate toward each other in foreign environments rather than integrating with the locals. In any event, contradictory to this assertion, a recent article in the *Post newspaper* quoted an Indian expatriate academic currently employed at UKZN as saying “professional jealousy and discrimination amongst social circles in the [Indian] community” amongst other South African Indian colleagues and members of the community was one of the main reasons why he experienced feelings of isolation, alienation and homesickness (Soobramoney, 2014:10).

Here, Hofstede’s cultural dimensions are particularly useful when understanding expatriate communities (Hofstede and Hofstede, 2005:5). This premise reflects the notion that the psychological well-being of the expatriate is mirrored in exceptional work performance and built on stability and support in their personal lives (Hofstede and Hofstede, 2005:7). As social support is linked to professional performance, it is inexcusable not to include it when trying to gain a deeper understanding of motivational behaviour of expatriates (Juhl and Fuglsig, 2009).

Dual career couples have been the norm rather than the exception in recent years. They can be defined as “a couple where both members earn an income to support the family unit” (Makela et al, 2011:185). In order to be successful, a dual career couple should have “a mutual commitment to each and coping mechanisms and the way in which partners experience each other’s behaviour and roles to be essential elements of managing such situations” (Selmer and Luring, 2013a:97). Dual career couples typically face more challenges work-life conflict and stress than their single career couples (van Gus and

Kraaykamp, 2008). Expatriate management literature has highlighted the role of the partner and family in determining a positive or negative experience of expatriation. Research has also shown that ‘support from the trailing spouse’, that is the spouse whose partner’s career forces them to live abroad and usually dedicate themselves to the family, is critical for successful adjustment (Van Gus and Kraaykamp,2008:345). Dependents often complicate matters even further for dual career couples considering relocation. Dual career couples have additional needs based that are emphasised by relocation. An example of this relates to finding “work for the spouse that adds value to their career...help with work permits and other work-related arrangements and if not possible other options such as further education opportunities, counselling services and general support services” (Makela et al, 2011: 188).

3.6.3.2 Socio-cultural adjustment

“Socio-cultural adjustment has been defined as the process of adaptation to living and working in a foreign culture” (Black et al, 1991:295). Thus, it has been argued that the degree to which cultural norms are different to those from another country is a challenge for expatriates adapting to a new culture (McCall and Hollenbeck, 2002:169). This is commonly referred to as ‘culture shock’. It has been used to refer to the process of understanding and adapting to differences in culture in day-to-day life in a foreign country. Common every day occurrences such as food, language, weather, shopping, schooling and socialising are often connected with outward display of culture shock (Pires, Stanton and Ostenfeldt, 2006:158).

Many theorists have contributed to the subject, among them Hofstede, who simply referred to culture as the ‘software of the mind’ (Hofstede and Hofstede, 2005:1). This means that it is the values, norms, traditions and other factors that control the way people behave and construct their logic. As a consequence of these differences expatriates’ experience general psychological uncertainty about how to behave and communicate with people, grounded on the values they have learned in throughout their lives (Juhl and Fuglsig, 2009:6). This ‘culture shock’ manifests itself as frustration, home-sickness and depression, and that result in the glorification of the home country (Pires et al., 2006:156). Homesickness has been defined as “the commonly experienced state of distress among those who have left their house and home and find themselves in a new and unfamiliar environment” (Henha, 2009:24) which results in a negative experience of expatriation.

3.6.3.3 *Safety and security issues*

Sending an expatriate on an overseas assignment does sometimes raise concerns around their safety and security, depending on the country or region in which the assignment is based. For example, it is commonplace to hear of expatriates being tortured and killed in politically unstable areas the Middle East, Nigeria, and now Australia-Oceania countries like Thailand, Indonesia where militant Islamic extremists operate freely. South Africa has been portrayed in the media as being a country riddled with crime such as hijackings, murder, house-breaking, rape and assaults, with high profile cases such as the ‘Oscar Pistorius’ murder trial and the ‘Anni Dewani Honeymoon murder’ making international headlines. Xenophobic attacks on foreign citizens have increased in violence and frequency in recent years and have been described in Chapter 2. Therefore considerations of personal safety and security for all expatriates are important factors to consider when making the decision to expatriate and when living in a new host country.

In the next section, HR policies and practices for the effective management of expatriates is discussed. Traditional expatriate management practices are described and its relevance to SIEs is assessed. Also Talent Management, specifically Global Talent Management and its relevance as a possible expatriate management (encompassing all types of expatriates) strategy is explored.

3.7 Strategies for effectively managing expatriates using HR policies and practices

Organisations that employ expatriates can minimise the risks of failure by expatriates by creating a comprehensive set of HR practices and policies. Traditionally HR has focused on how recruitment and selection practices, training and career development policies can help organisations reduce expatriate failure.

3.7.1 *Recruitment and selection*

In the past, literature concerning expatriate recruitment and selection was predominantly prescriptive, focusing on how managers and corporate executives should be selected and what criteria should be used. The literature further alluded to individuals who were selected

based on the organisational requirements regarding the characteristics or qualities he or she may possess (Anderson, 2005; Sharma, Bhatt and Singh, 2014).

The criteria used by organisations when they are selecting personnel for overseas assignments is also a major focus of the literature. It has been argued that the selection of expatriates should take into account a number of variables beyond technical capabilities and proven success in the home organisation. The main argument is that selection should take into account, among other things, interpersonal skills, cultural awareness, ability to handle stress, family situation and motivational issues (Sharma et al, 2014).

A key gap in the literature points to the fact that the individual tends to be sidelined. The organisation emerges as the most active player in deciding who will and will not become an expatriate, as the exploration of individual involvement seems relatively neglected. Mayrhofer, Sparrow and Zimmerman (2008:89) argue that although SIEs are a talent source easily accessible to HR, by using recruitment and selection processes that maybe cheaper than hiring traditional expatriates, there are some concerns with the group. For example, highly educated SIEs with experience and scarce skills may be harder to attract as they perceive their own value and have easier access to employment opportunities. Mayrhofer et al. (2008) advise that organisations should develop more sophisticated processes to identify SIEs and increase their organisational attractiveness through branding as the employer of choice.

Howe-Walsh and Schyns (2010) suggest the need for selection processes to focus on how SIEs are attracted to the organisation and on their anticipatory adjustment and guide that the organisation should provide help for them to reach their performance potential after arrival. They go further to explain that a mentoring system and/or co-working system would allow SIEs to adjust more effectively. Howe-Walsh and Schyns (2010:260) also posit that HR intervention should position the employer as an 'employer of choice'; thus proactive and positive interaction with potential incumbents is a critical pre-requisite to the formal selection process. Clarifying job performance, expectations and accurate communication of goal objectives are the preliminary steps in the preparation of the expatriate as they reduce uncertainty and the feeling of being 'out of sight, out of mind' (Caliguiri and Colakoglu, 2007:393) and therefore help motivation in the sense that, when the expatriate knows what to expect, there will be no disappointments. This may not be classified as real training but it is a step on the way, for the company as well, as it helps in the process of determining what kind of training is required.

HR should take cognisance of the following issue raised by when sourcing SIEs, namely, the role of family, including that of parents and extended family in the home country raised by Richardson (2000). The use of globally standardised selection criteria versus local variants, like educational background, work preference and other skills, knowledge and abilities needs to be considered in selection process. Howe-Walsh and Schyns (2010) argue that during the selection process interviewers should also assess the ability of the candidate to co-operate with colleagues from other countries; this will help to gauge how successful the candidate's adjustment will be.

The recruitment and selection process is critical in the case of SIEs and traditional 'company backed' expatriates. Prior international experience has been positively linked to success with traditional expatriates (Suutari and Brewster, 2000; Arthur, Khapova, Wilderom, 2005; Altman and Baruch, 2012). McDonnell and Scullion (2013) suggest that that this may hold true with SIEs. They argue that this is a factor worth consideration when reviewing a candidate's CV. McDonnell and Scullion (2013:150) go on to explain that, when recruiting an SIE, organisations need to consider soft skills, for example, cross cultural skills and tolerance, as there is no pre-departure training by the organisation for the incumbent.

3.7.2 Preparation

Pre-departure preparation is positively linked to general adjustment of expatriates in their new environments. With an international assignment, the expatriate is not only changing jobs but also a way of life. The new demands placed on him/her and family members must be adequately addressed in the preparation phase. Vance (2005) and Diener and Hagen (2009:1197) suggests pre-departure preparation should be extended to include onboarding, cross-cultural training, foreign language training and orientation that includes family.

Richardson, McBey and McKenna (2008:490) argue that the use of realistic job previews and living conditions previews are important in the recruitment and selection process so as to ensure an precise account of the role and expectations of the incumbent in the organisation. Realistic living and job previews provide the expatriate with the basic information he/she would need about work related issues and living-related issues. Felker (2011) conducted in-depth interviews with 22 SIE respondents exploring their experiences in Western European countries. She found that most had relocated because of professional development opportunities and that they had done very little research on their career and employment

opportunities before moving. In addition, she found that organisations were underutilising the skills available through these SIEs in order to gain a competitive advantage. In another survey done in Singapore by Lee (2005:173), it was found that limited job autonomy, job suitability and job variety as well as a poor psychological contract can lead to the perceived underemployment of SIEs. This indicates that organisations should assign jobs to fit SIEs' levels of skills, abilities and experience in order to enhance the success of both the SIE and the organisation. In a recent survey done by KPMG (2013:12) found that 60% of organisations provide such information as “company’s transfer policy, compensation and benefit package, taxes, travel, housing and schools in host country, vacation and home leave and repatriation after the assignment during the preparation phase”. Information about living conditions, the cost of living, cultural values, socio-economic circumstances, acceptable business practices and etiquette and social norms of the foreign country is also provided (Vance, 2005:376). In this way the expatriate is exposed to the realities of living and working in the host country and thus the candidate is given the opportunity to accurately assess his/her suitability for the specific assignment.

Part of the preparation of a candidate is the pre-departure training, as failure to perform or adjust is often blamed on the lack of proper training (Sharma et al, 2014). Failure to perform, results in expatriate recalls can have both direct and indirect costs. Direct costs include salary, training costs, travel and relocation costs etc. while indirect costs include unquantifiable aspects like damaging relations with local organisations and customers, loss of market share, loss of corporate reputation and lost business opportunities (Shen, 2005).

As part of pre-departure training, a recent survey done by KPMG, 37% of companies surveyed engaged in formalised cross-cultural training. In the same survey, 41% of all companies engage in some form of training that helps equip the expatriate with the necessary knowledge, skills and attitudes to deal with the cultural shock that takes place soon after arrival to the host country (KPMG, 2013). Then in the months following, when adjustment to the new environment becomes an issue, the cultural and language knowledge gained will assist in a smooth transition. This kind of training also helps foster an appreciation of social norms as well as the business and ethical standards of the region so that any embarrassing mistakes can be avoided. However, with SIEs there is no opportunity for pre-departure training, therefore only once the candidate has arrived to take up the position can such training be offered.

3.7.3 Adjustment of expatriates

The focus of HR has to be on the adjustment of SIEs once they have joined the organisation. Adjustment to the new culture works in four stages: “the honeymoon stage, the frustration stage, the stage where some new behaviours are adopted and, finally, complete adjustment” (Black, 1998:278). Hofstede and Hofstede (2005:5) identified three consequences of acculturation: namely, persons persist having emotions of alienation and discrimination; bicultural adaptation, and, thirdly, going ‘native’. With respect to adjustment in the host country, Black et al (1991:291) “differentiate between individual, job and organisational culture and non-work factors that influence adjustment”. SIEs bear the responsibility of preparation prior to expatriation. In terms of HR, the fact that SIEs will arrive without prior preparation by the organisation will put more emphasis on the selection process and thus on self-efficacy and skills. From the limited literature in this area, it can be assumed that not many companies practice expatriate HR when dealing with SIEs. The approach taken by most companies can be classified as ad-hoc rather than as having an established policy. To use the words of Baruch and Altman (2002:252), they are just managing chaos’.

Figure 3.2 provides a summary of the suggestions made by Howe-Walsh and Schyns (2010:269) regarding how different human resources (HR) practices can influence adjustment.

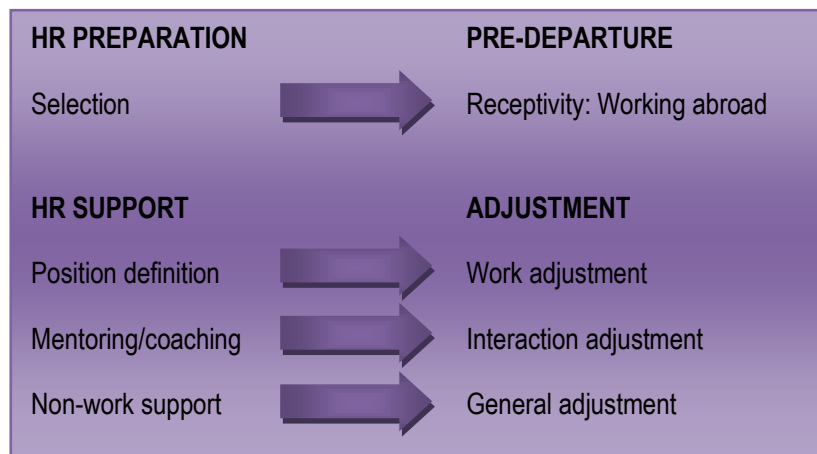


Figure 3-2 HR practices and SIE adjustment

Adapted from Howe-Walsh and Schyns, 2010:269

The authors argue that there are different HR practices to support the various types of adjustment identified. HR support is critical in order to supplement the SIEs’ own efforts at adjustment. HR can assist SIE adjustment positively in various realms. Firstly, having a proper recruitment strategy in place allows the organisation to have a competitive advantage.

Secondly, training and mentoring practices together with attention to non-work issues will permit the organisation's SIEs to become effective more quickly than if there was no support. When choosing how best to support them to adjust more effectively, HR practitioners can take into consideration the motives of SIEs.

Doherty et al, (2008:738) found that there were important differences between the reasons of expatriates for accepting an assignment and the motives organisations believed were relevant. This proves that it is critical for HR to analyse the needs of the SIE in order to ensure successful adjustment and retention. As one option, HR could offer a variety of support to the SIE. HR should also involve line managers in their offerings of support to the SIE so that they, together with the SIE, can make the best decision regarding the kind of support the SIE requires (Howe-Walsh and Schyns, 2010:264).

Increasing globalisation focuses on employers' use of HR interventions to augment their selection of candidates and improve their competitive advantage over other organisations. While in some countries skills shortages influence organisations to positively engage with SIEs and "even actively recruit internationally, making use of supportive HR practices can only prove beneficial to organisations" (Howe-Walsh and Schyns, 2010:270). In order to enhance their competitiveness, organisations proactively encourage SIEs to join the organisation. Richardson et al. (2013:63) suggest that "an organisational culture that supports international mobility coupled with the development of weak ties into productive networks and employee ownership is a powerful motivation for staff retention and talent management". Howe-Walsh and Schyns (2010) and Richardson (2009) further suggest that HR should promote an awareness of the potential for international experience within the organisation and highlight its positive features.

In addition, depending on the background and motivations of the SIE, the organisation could provide cross-cultural training using either formal interventions (classroom) or a formal support system like a buddy or mentor. They go further to suggest a "readily available real-time support to clarify issues or situations about which the SIE is unclear, which can be non-work related or work related" (Howe-Walsh and Schyns, 2010: 263). Altman and Baruch (2012:233) have suggested that "job search assistance, continuing education, allowances for professional seminars, assistance with finding work and visas are key HR aspects that impact on partner and family adjustment".

Doherty and Dickmann (2012) suggest that SIEs may experience uncertainty in their new host culture and work context; it is important to factor this into HR policies and practices. They suggest that cultural seminars that focus on cognitive, affective and behavioural competencies can assist in faster adjustment to the new environment. In addition, they state that management actions in combination with the development of organisational social networks may assist in the adjustment, effectiveness and efficiency of the SIE.

Toh and DeNisi (2007) and Huang, Chi and Lawler (2005) point out that the manner in which local colleagues interact with SIEs impacts on their adjustment. To avoid any misunderstandings that could lead to conflict, local colleagues should give information and social and emotional support in understanding and adapting to local norms, values and behaviours (Vance, Vaiman and Andresen, 2009:649). Organisational culture that is tolerant of foreign employees and values the benefits they bring to the organisation will greatly improve the rate of the SIEs adjustment process.

HRM processes need to recognise the knowledge, skills and abilities of SIEs and match these with organisational needs. Existing competency frameworks must be reshaped in order to accommodate the talent SIEs bring to the organisation. Likewise, performance management systems, reward systems and career development practices need to support the full utilisation of the talent of SIEs and prevent underemployment (Lazarova and Cerdin, 2007:404).

The legality of their stay in the host country is an area where organisations can involve themselves to assist the SIEs to secure their work permits. The organisation can adopt policies that allow the SIEs to return home to re-apply for their visas, so as to allow the smooth running of the organisation while ensuring the retention of talent. As SIEs initiate their own international move, they are expected to organise all aspects of the move themselves. However, organisations that attract SIEs could take the opportunity to become more involved in the logistical and technical aspects of the move (CIPD, 2013).

Richardson et al. (2013: 83) found that the retention of SIEs was positively linked to the “culture of mobility” that pervaded the organisational culture of the mining company under investigation. SIEs need to be engaged in long term talent and leadership development programmes which include challenging assignments and develop ownership, autonomy and recognition. The relationship between international experience and recognition needs to be made explicit to all employees. This involves the use of more systematic mobility and career development strategies related to well-defined talent needs and requirements. From a global

staffing perspective and in contrast to the risks of losing talented SIEs to the global market, they can benefit organisations as a future source of talent, thereby helping to address problems of international talent shortages. McKenna and Richardson (2007:307) argue that the “creative use of the external labour market can provide important staffing advantages where buying talent can save time and be less expensive than building talent internally”.

Stahl, Chua, Caliguiri, Cerdin and Taniguchi (2009) found widespread employee dissatisfaction with career management programmes in terms of being able to integrate an international assignment into a clear career path. In contrast to this finding, Yan, Zhu and Hall (2002:377) found that “career development is arguably the most important long-term concern of the individual in formulating his or her psychological contract with the multinational company, in the context of an overseas assignment”. Recent research done by van der Heijden, van Engen and Paawe (2009:837) suggests that “the quality and degree of career management support offered to expatriates could have substantial implications for expatriate motivation, engagement and retention and thereby influence the outcome of long term international assignments”.

3.7.4 Career development

For expatriates to be motivated to remain in their international assignment for the duration is largely dependent on the career development opportunities that the employer offers them. According to Sharma et al (2014:17) successful career planning would include:

- “Positioning the international assignment as a stepping stone to promotion
- Providing support to expatriates
- Provide career support for the spouse or partner”

In the case of self-initiated expatriation, “even though individuals have taken on the responsibility for their careers to a great extent, the organisation that employs them still has a responsibility to contribute to their personal and professional development” (Howe-Walsh and Schyns, 2010:264). Taking into consideration the fact that SIEs initiate their own international career experiences, it can be argued that human resource practices for them should be from the perspective of their personal well-being.

From the HR perspective, the situation referred to in the former paragraph raises important questions on how best to deal with this paucity of information and how to effectively manage

an increasingly international, varied and mobile workforce. It also highlights the importance of new forms of individual agency associated with the concept of a “borderless world” (Diener and Hagen, 2009:1196). New HR strategy would now have to encompass the complexities and multidimensionality of issues such as migration, citizenship and mobility patterns and their impact on the career choices and paths of individuals, as well as the organisational policies and practices to support and expedite career development. Vance (2005) called for a theoretical and methodological expansion of literature regarding the challenges faced by HR in terms of managing global talent, given the importance attached to international work experience as a precursor to “developing key competencies for a career in a global economy”, “securing ongoing career success”, and embracing a global mindset (Vance, 2005: 374-375).

Therefore, HR practices should focus on the personal well-being of self-initiated expatriates, therefore an examination of the kind of support organisations should provide to facilitate personal and professional development of SIEs, given that this group of individuals is portrayed as having a high degree of self-direction and a low degree of organisational commitment (Doherty, 2012). Howe-Walsh and Schyns (2010) argue that organisations should consider whether their current practices enhance or hinder the successful employment of SIEs. They suggest that, besides work-related human resource practices to support SIEs, there should be an expansion into non-work areas like partner relocation and/or finding accommodation. In order to gain competitive advantage from SIEs, organisations need to ensure a smooth adjustment for them when they transfer from one country to another. Aycan (1997:445) states, “organizational assistance reduces the time the expatriate has to spend on these issues and facilitates adjustment to the new work setting”. This practice can then become a ‘pull’ factor in the competition for global talent. Developing a strong brand as an organisation of choice because of the support offered to self-initiated expatriates is critical in the recruitment process and can be a selling point in attracting talent (McNulty, 2012).

In international human resource management (IHRM) literature, expatriate management is given particular attention as it contributes to the organisation’s overall performance. Developing key talent in an organisation is usually managed by a different division of specialists other than those managing expatriates (Cerdin and Brewster, 2014). Expatriation is managed by specialists focused on the compensation packages, with little connection to training, performance management, individual career development or long term careers (van der Heijden et al, 2009). Cerdin and Brewster (2014) explore a link between talent

management and expatriation and classifying it as 'global talent management'. This will be explored in the next section.

3.7.5 Talent management

In the international human resource management (IHRM) literature, expatriate management is often separate to a certain degree from the organisation's global policy of human resource management. In essence, expatriation management and talent management, while undeniably closely related, are rarely linked. According to Cerdin and Brewster (2014), global talent management seems to be the right label for capturing the connection between talent management and expatriation. However, Cerdin and Brewster, (2014:245) identify two streams in this relationship, in line with two perceptions of talent management, namely, that is an elitist stream or a broader perspective where all employees are considered talent.

They further explain that the talent segmentation approach to expatriation stems from the logic behind its use. Firstly, where the primary objective is to fill posts, which leaves very little opportunity for consideration of individuals' careers. Secondly, where the objective is about enforcing central control. Thirdly, the objective would be the development of individual careers (Cerdin and Pargenux, 2009:10). The two objectives of control and coordination may be equally strategic in their impact upon the expatriate and the organisation. Controlling roles are much less likely to have a talent-management aspect than are coordination roles. It is for this reason, for coordination roles, as for those (rare) expatriation roles that are explicitly designated as developmental, talent management is a key focus, as the organisation is conscious of the development of the individual's skill set, and of the capabilities of those they interact with (Swailes, 2014).

The elitist approach to strategic talent management focused on individuals who are included in the organisation's strategic talent pool and who occupy, strategic talent positions (Collings & Mellahi, 2009:306). Expatriates may well belong to this group. This approach to talent management combines a strategic use of expatriates with a strong focus on talent management, the purpose being to develop individuals to assume roles with greater responsibilities within the organisation. In this way, talent management is synonymous with the traditional 'high-potential' approach (CIPD, 2013).

This "talent segmentation perspective is consistent with Pareto's 'law of the vital few', which, in this case, suggests that about 80% of an organisation's value adding derives from

about 20% of its employees” (Swales, 2013: 32). Collings and Mellahi (2009:305) suggest that the objective of talent management is to identify key positions that exponentially add to an organization’s sustainable competitive advantage. The relationship between the talent segmentation view involved in some expatriation assignments and the segmentation view of talent management is apparent in international developmental assignments, but goes further than that. A valuable aspect of talent development will be, in many cases, the expatriation experience. The expatriation cycle can develop global leaders within the organisation assuming that according to Stroh, Black, Mendenhall, & Gregersen (2005:45), there has been effective selection, time is well spent on personal development and there is successful repatriation.

Previous research has focused on selection criteria such as partner support and communication skills (Makela et al, 2011; Lazarova, Westman and Shaffer, 2010), as mentioned earlier. On the other hand, criteria that focused on expatriate development within the rationale of talent management, such as leadership qualities, or alignment between personal and corporate values, are mostly overlooked in the literature.

A conception of talent management as broader than the segmentation approach locates it within a global HR strategy and may well include expatriation within it. Here, expatriation is seen as an invaluable developmental experience offered to employees being assigned abroad. Using a talent-management philosophy, the developmental experience of expatriation and its long-term impact on the individual and the organisation come to be seen as its focus. Here, individuals’ careers are placed at the heart of expatriation management as a crucial aspect of talent management (Sentilkumar and Khumdar, 2011; Cerdin and Le Pargneux, 2009). This view assists in ensuring that the different stages of an expatriation, before, during and after, are closely integrated with one another and helps toward better integration of international work experiences with the rest of the employee’s work experiences. “The logic of talent management meets individuals where they are in order to develop their skills, rather than simply selecting them based on the skill level they currently have. For this reason, individuals’ current intercultural skills must first be known in order for the organization to develop them further” (Cerdin and Brewster, 2014: 245).

For instance, since the SIEs were first identified by Suutari and Brewster (2000), this group of people with boundaryless careers constitutes a significant proportion of the workforce with international experience. Organisations are beginning to take a wider view of the potential

sources of talent in international mobility. A talent-management approach to expatriation and international experience goes beyond the few employees who have been identified as potential top managers, and beyond those selected as traditional expatriates, to integrate all those who might have international experience, with the aim of developing their careers, their value to the organisation, and their retention (Cerdin and Brewster, 2014).

Global talent management is centered on the development of employees, and it includes both high-potentials development and global-careers development. Collings and Scullion's (2008:12) definition of global talent management goes beyond simply developing a framework for "high-performing and high-potential strategic employees on a global scale; it implies the development of a career system within the organisation, open to all employees, and integrating international work experiences as a step in the overall careers of individuals".

Global-careers development reflects the idea of return on investment, both for the individuals and for the organisation. In this sense global talent management ignores selection from the external labor market and focuses on 'development'. Development encompasses HR activities that enhance employees' skills and competences. While global talent management encompasses all the traditional HR activities contributing to development, a critical issue here "concerns the provision of relevant work experience, particularly including international exposure, to develop individuals' skills. This should go alongside retention strategies so that the organisation has a return on its investment" (Cerdin and Pargneux, 2009:12).

There is plenty of evidence that expatriates and former expatriates believe strongly in the concept that living and working in another country is invariably an extremely powerful learning experience that people do not forget. Not only are there the experiences of learning new knowledge and understanding (know-how), but there are also new contacts and networks (know whom), and, for the expatriate and his or her family, the chance to think about what is important to them and to find out about their resilience in coping with unfamiliar situations (Haslberger & Brewster, 2009).

Global-careers development also adopts strategic expatriation management. It goes further than the high-potential approach by including a broader range of employees. In this respect, organisations need to manage expatriates strategically, and also manage carefully all other kinds of international and cross-cultural experience, including those of people who never leave their home country but interact with people from other cultures and those host-country nationals in close contact with expatriates (Toh & DeNisi, 2005). Not only will this have

immediate performance benefits, but also it will create a wider long-term understanding of internationalisation across the organisation.

This practice can be part of the organisation's talent management strategy, where a 'one size fits all' approach is replaced by an individually tailored practice that caters to the individual and their family needs.

Once the candidate has assumed their post, "the learning and development process begins with on-boarding, initial training and learning for the job, and development to refine processes and improve capability as well as preparing individuals for other job positions. Initial indoctrination and orientation (or on-boarding, as it is sometimes called) creates lasting impressions" (Schneider, 2008:47). It is important for "new talent to have a positive first day on the job and an outstanding first week. In some job situations, where employees have an opportunity to move quickly to another job with little investment, an unpleasant experience in the first week of work may result in an early turnover, that is, departures in the first month of employment. When this number is excessive, 10%, for example, this is an indication that either the selection was improper or that something happened in the early days of employment to change the person's opinion" (Collings and Mellahi, 2009:309).

On-boarding helps the individual to comprehend its values, mission, philosophy, policies, and practices. Employees have to do so even the unwritten ones – so that preliminary success can be achieved. It is critical so as to avoid frustrating experiences, missteps, miscues, and unpleasant surprises, as well as the best opportunity to secure the employee commitment to the organisation. "Both the motivation and the potential for engagement are extremely high, therefore both the efficiency and effectiveness of handling the orientation are important" (Derven, 2008:50).

Regardless of the level of talent, a certain amount of preparing for the job is necessary such as in preparation for skills or applications unique to the job. Mostly, it will be the adjustment to the new job and learning specific practices, technology, and procedures. If job competencies are already in place, significant skill building will not be needed, if not, then significant training may be required. "A variety of learning and development programs must be available to continue to improve performance, refine skills, learn new techniques and adjust to changing technology with specific emphasis on the non-traditional ones" (Vaiman, Scullion and Collings, 2012:925).

As part of the induction process, “it is recommended that a competent mentor is selected to support the new employee and to provide information regarding the key challenges of the job, the performance expectations associated with it, the history of how the job was created and the possible political dynamics associated with the job role” (D’Aurizio, 2007:229). It is suggested that induction programmes advocate employee integration through the establishment of employee social networks (Derven, 2008).

This can be accomplished by the use of social networking software that allows employees to create profiles of their professional and personal lives as a method of engagement with colleagues and the employer (Derven, 2008:50). When new employees discover commonalities local colleagues, they are able to work together more effectively on professional, work-related tasks (D’Aurizio, 2007). The follow-up process allows managers to determine if there were adequate resources to allow for employee integration, and if there are any political obstacles to professional socialisation, as well as if mentor support is adequate and, lastly, determining the new employee’s training needs are (D’Aurizio, 2007:228). Information gathered during such a process will allow programme improvement (Schneider, 2008:48). Caution should be exercised to ensure that these web-based interventions are supported by frequent discussions between new employees and their managers in order to determine integration progress and possible obstacles (D’Aurizio, 2008:228).

3.8 Conclusion

This chapter has reviewed existing literature concerning Expatriate and SIE management and provides the theoretical foundation upon which this study is built. Upon closer examination of the literature the following gaps in the current scholarship were found that the study aims to address, firstly this contextualises the study of SIEs in a different organisational (meso-level) as well as country setting (SA-macro-level). Secondly, it provides empirical evidence of the motives and career experiences of SIEs from mainly African countries in SA. Thirdly, this study examines all levels of academia, unlike other studies on expatriates and SIEs that have focused primarily on executives or managerial levels of employees. Fourthly, by using migration literature, an exploration of the boundaries (macro-, meso- and micro-level) that shape the career experiences of SIEs in SA are explored. Finally, by using the current body of scholarship as well as the empirical evidence in this study, recommendations are made to

improve the management of SIEs thereby making the international career experience a positive one for all stakeholders, thus contributing new knowledge in this field. In the next chapter, the international career experience of SIEs is situated in the contemporary careers framework in order to provide the theoretical and empirical foundation upon which to build this study.

Chapter 4

Career Management

4.1 Introduction

This chapter seeks to explore the theoretical foundation of the ‘Contemporary careers framework’ in particular the Protean and Boundaryless careers for the exploration of the career orientation of expatriate academics at UKZN, in South Africa. In this chapter, the “Protean and Boundaryless” career orientations are examined from both a theoretical as well as an empirical perspective. The concepts that make up the “Protean and Boundaryless” career orientations are described and empirical studies using these two inter-related but distinct concepts are examined. Here too, the importance of a protean career attitude for SIEs’ is examined as well as the concept of career capital mentioned in Chapter 3 and how the accrual of this resource is the desired outcome of any international career experience is explored. Perhaps the greatest mystery is that these concepts have been given credence with astonishing ease. These concepts certainly have their virtues but some authors have criticised them as being problematic as a foundation for conducting research.

In contemporary times, “an individual’s career is flexible with no particular predictable pattern, unlike traditional career structures” (Okurame and Fabunmi, 2014:73). The current generation of employees changes jobs and employers more easily and are willing to accept lateral career movements (Lyons, Schweitzer, Ng, Kuron, 2012). The current generation of employees is increasingly assuming responsibility for their own career development to ensure increased employability. This is in part due to “a stronger motivation by individuals to build their own personal career capital rather than wait for their organisations to give them the opportunities to advance” (Okurame and Fabunmi, 2014:75). This new trend has led to new concepts that better capture the emergent career orientations (Clarke, 2009). The literature submits that two perspectives aptly assess contemporary career attitudes and these are the “Protean and Boundaryless” career theories (Briscoe and Hall, 2006; Briscoe and Finkelstein, 2009). “Protean and Boundaryless” careers have materialised as the “symbols of the new career” (Briscoe and Hall, 2006:5). These will be examined in the next section.

This chapter, Career Management, will be presented as follows:

- Protean career orientation
- Boundaryless career orientation
- Protean and Boundaryless Career Attitude
- Career Capital

This chapter seeks to provide the background for the analysis of the following Aims and Objectives:

Aim 2: To explore the nature of the international career experiences amongst expatriate academics at UKZN

Research Objective 7: To evaluate the career orientation of expatriate academics at UKZN

Research Objective 8: To determine whether demographic factors such as age, gender, location of expatriate academic's family, years of experience as an academic, duration of expatriation experience and field of study influence expatriate academic's motivation to expatriate, international career experience and career orientation at UKZN

Research Objective 9: To explore whether there is a relationship between expatriate academic's motivation to expatriate and their international career experience, their motivation to expatriate and career orientation and between their international career experience and career orientation at UKZN

4.2 Protean career orientation

The protean career orientation is theorised as a career that is driven by the person not by the organisation (Briscoe and Hall, 2002, 2006). Briscoe and Hall (2006:31) describe "a protean career as focusing on achieving subjective career success through self-directed vocational behaviour". A protean career orientation, according to De Vos and De Soens (2008:449), sets the tone for career management initiatives that might include learning about one's self and taking practical initiatives. Arnold and Cohen (2008) have expressed concerns regarding the concept itself, as it has an overpowering sense of what can be considered normal and tangible and has evolved from a useful empirical construct to factual social norm. In fact they argue that "that career presents infinite possibilities for individuals. Rather, economic,

political, cultural, social, occupational factors serve to structure available opportunity”(Arnold and Cohen, 2008:20).

A protean career attitude is made up of two dimensions, namely, values-driven tendencies and self-directed career management. First, a “values driven attitude refers to a person’s internal values that provide guidance and measurement of success for the individual’s career” (Briscoe and Hall, 2006:8). Thus the organisation serves as the context where employees are given the opportunity to balance their career aspirations with their personal values and express their personal values through work (Cabrera, 2009:186). Arnold and Cohen (2008) argue that the protean career attitude and its related impressions seem to imply that someone not possessing these qualities cannot be successful, they go further to suggest that people can share the values of their organisation can be successful too, not necessarily encompassing this strong sense of individuality required by the protean career attitude.

Second, the self-directed career management attitude is the extent to which individuals take responsibility for the direction that their careers take. This involves “being adaptive in terms of performance and learning demands” (Briscoe and Hall, 2006:8). This would therefore imply that people who have a protean career orientation are proactive and engage in life-long learning. With a protean career orientation people’s own personal career choices and search for fulfillment are the assimilating ingredients in their life.

The criterion of success is internal (psychological success), not external as found in traditional career orientations (Hall, 1976, cited in Briscoe and Hall, 2006:2). “Psychological success means achieving objectives that mean a great deal when measured against one’s individual goals, as opposed to externally defined goals” (Briscoe and Hall, 2006:3). The protean core values are “freedom and growth, mobility is high and the main success criteria are subjective (psychological success) vs. objective (position, status, salary)” (Hall, 1976, cited in Briscoe and Hall, 2006:6). Subjective career success therefore “reflects individuals’ perception of success and their personal assessments of their career accomplishments” (Enache, Simo, Sallan and Fernandez, 2008:1941). In a meta-analysis of the career success literature, Ng, Eby, Sorensen and Feldman (2005:364) found that “organisational sponsorship and stable individual differences are generally more strongly related to subjective career success”. The meaning of career success to individuals with a protean career attitude is discussed later in the chapter. The two dimensions that make up the protean career orientation are addressed below.

4.2.1 *Self-directed career management*

The protean career has been described in the literature as a series of career cycles. Every time someone goes through these career cycles, they have to adopt new performance standards and learning requirements (Mirvis and Hall, 1994 cited in Hall, 2004:7). This ability to learn new proficiencies requires the meta-skill of adaptability which can be learnt/developed “from job assignments that stretch us in new ways” (Hall, 2004:10). Segers, Inceoglu, Vloeberghs, Bartman and Hendrickx (2008: 214) suggest that a person with a protean attitude will be motivated by achievement and opportunities for personal growth through formal training or through mentors or coaching in the organisation itself, thus allowing them to move through the career cycle. Job security then becomes obsolete as it is further suggested that those with a protean attitude will be less motivated by this as they are very capable of adapting to new roles and challenges (Segers et al., 2008).

4.2.2 *Values driven*

Having a values-driven attitude implies that people measure their success based upon what they value (psychological/subjective success). This is in opposition to the traditional measures of success (vertical objective success). Segers et al. (2008:215) argues that people displaying this aspect of the protean career attitude will be “more motivated to follow their ‘internal compass’ by upholding their personal ideals or principles, rather than extrinsic motivators such as money, status or promotion”.

4.2.3 *The protean career contract*

The psychological contract is characterised as a set of “individual beliefs, shaped by the organisation, regarding terms of an exchange agreement between individuals and their organisations” (Rousseau, 1995:9). Contemporary careers literature suggests “that there seems to be a shift from the organisational career towards the protean career; hence there should also be a change in the career contract”.

Hall (1996:14) stated that the protean career contract comprised of:

- The career agent themselves manage their career not the organisation

- The career is a lifelong sequence of events, abilities, learning, changes and identity transformation where ‘career age’ counts and not how old one is
- Growth takes place through ongoing learning, is self-directed and connected and is entrenched in work challenges
- Development does not always about formal qualifications, retraining or vertical mobility
- A successful career involves mobility, that is, moving from the current state to a new state
- The organisation should provide stimulating projects, opportunities and resources for growth
- The main aim is psychological success

The protean career contract requires both parties in the employment relationship to take greater responsibility in valuing long term employment relationships will greatly influence profitability (Buchner, 2007:92). Adaptability seems to be the key factor in achieving growth and success for both the organisation and the individual (Hall, 2004). Perhaps the main difference in the protean contract is the person is flexible so as to gain ‘psychological success’ and uses a well-developed sense of identity to do so (Hall, 2004:6). Contradictory to what is expected in traditional career management, employees engage this psychological contract with themselves, as a consequence there is a higher level of control in spite of organisational input (Hall, 2004:6).

Boundaryless and protean career assumptions change the content of the contract and thus what is a violation is not clear. Boundaryless psychological contracts involve the organisation giving individuals a chance for training and development opportunities, networking and stimulating employment at a viable salary in exchange for the employee’s delivery of high job performance (Granrose and Baccili, 2006:167). An individual would have organisational commitment based on the organisation’s providing interesting work or skills development that provides the opportunity to increase their employability. Violations of the protean career contract may occur if it does not involve the promise of long term job security or promotions, should that individual have wanted upward mobility or job security. Thus this would result in reduced organisational commitment and an increases turnover intention (Hall, 2004:4).

In the case of people who have protean career orientations, their contracts would include expectations that the organisation would provide opportunities for personal growth and for the achievement of work-life balance. Organisational commitment would exist as long as the organisation provided opportunities for development and growth but a violation may result in the employee wanting to leave (Granrose and Baccili, 2006: 178).

4.2.4 Career meta-competencies

Those people following a protean career possess high levels of individuality or self-awareness as well as flexibility (Hall, 1996; Hall, 2004:10). Other career theorists have found that there are two career ‘meta-competencies’ that help equip individuals to be more protean, namely, adaptability and identity (or self-awareness).

Briscoe and Hall (2006) found that the reliance on competency models to assess potential employees in many organisations is misguided, as the events evolve too rapidly for organisations to assess people and develop them against a fixed set of competencies.

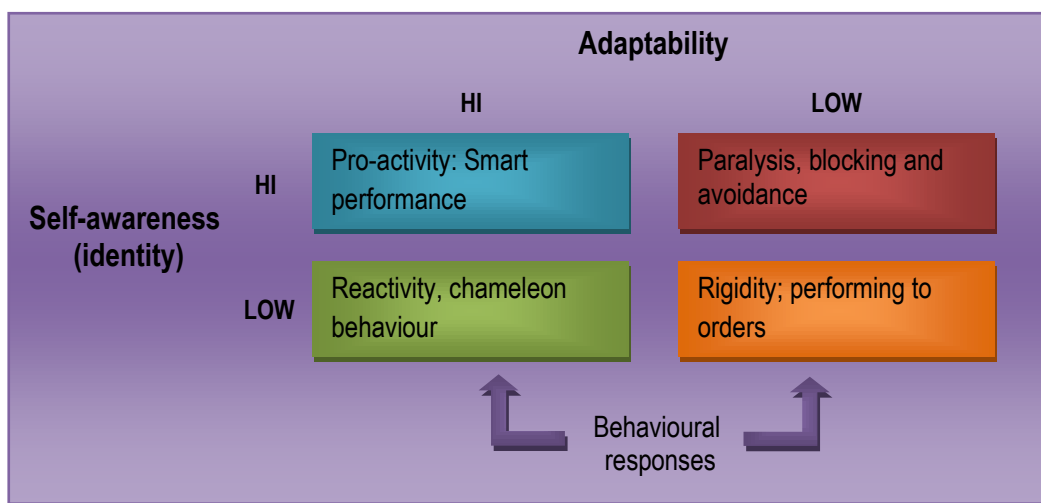


Figure 4-1 Interactive effects of meta-competencies

(Source: Hall, 2004: 11)

Briscoe et al. (2006:50) argues that it was healthier to develop the ‘meta-competencies’ of greater adaptability and self-awareness, because this allowed people to develop, if not, then this could be counterproductive. Of course the ideal situation is obviously the high end for both competencies thereby creating a ‘proactive and smart performing employee’.

Hall (2004:6) argued that flexibility allows the person to be correct themselves and enthusiastic in responding to new demands from the environment rather than being reactive and depending on inputs from the organisation. This “self-directed behaviour reflects the self-awareness that allows for true pro-activity and self-direction and the individuals’ own personal goals and values acts as guide for them” (Hall, 2004:8).

Meta-competencies permit a forward thinking approach to facilitate career growth and development. Developing such meta-competencies should result in a person becoming more protean (Hall, 1996:12). For example, “an adaptable individual should exhibit flexibility, exploration, openness to diversity, eagerness for the new and the unknown and should be comfortable with tumultuous change” (Hall, 1996:10).

4.2.5 The importance of a protean career attitude for SIEs

Briscoe et al. (2006:35) argued that people with a protean attitude take an independent and proactive role in managing their own career advancement and follow their own career principles and focus on achieving subjective career success. Ever since the SIE concept was first invented, authors have focused on the inherent motivation, personal action and changing self-directed career paths directed toward expatriation (Inkson et al., 1997; Suutari and Brewster, 2000:417). Furthermore, a protean career attitude would comprise of a fundamental career-related attitude that would motivate the career advancement of SIEs and their international career experience on the whole (Crowley-Henry, 2007:45; Cao, Hirschi and Deller, 2012).

Cao et al. (2013) add to the limited research concerning the relationship between a protean career attitude and SIEs. Cao et al. (2013) attempt to explain why and how the protean career attitudes affect SIEs career experiences positively. Using the developmental-contextual theory of Vondracek, Lerner and Schulenberg (1986), their study focuses on the active role an individual takes in their own development. SIEs with stronger protean career attitudes are believed to show more self-directed and values driven career management actions during expatriation, thus directly impacting on their living, social and organisational environments and therefore influence their experience in the host country (Cao et al, 2013:57). This study also attempts to add to this particular area of focus in current scholarship, by examining the relationship between a protean career attitude and SIEs.

Having a protean career attitude means adopting an individualistic perspective concerning career success as well as a holistic point of view that encompasses both work and non-work related experiences (Briscoe et al., 2006). Thus the framework provided by Cao et al. (2013) incorporates both subjective career success and also well-being as pertinent consequences for SIEs. Cao et al. (2013:60) propose that a protean career attitude applies an indirect positive effect on SIEs' career satisfaction, life satisfaction and intention to stay in host country, which are expedited by a higher degree of cross-cultural adjustment. Unlike as in the previous literature, that provided contradictory evidence concerning the relationship between a protean career attitude and mobility preferences (Briscoe and Hall, 2006).



Figure 4-2 Conceptual framework and proposed mediation model to be tested explaining the positive effect of a protean attitude on SIE experiences

(Source: Cao, Hirschi and Deller, 2013:59)

Cao et al (2013:61) use career satisfaction as a sign of subjective career success. In order to advance their own career goals in a self-directed way, SIEs exhibiting a protean career attitude may take the initiative and deal with their careers looking for an organisation that is suitable to their principles and values and adapt their own work processes (Cao et al, 2013:61). As a result they are able to achieve higher subjective career success (Harvey, 2011:69). Cao et al, (2013:65) proposed a relationship between a protean career attitude and life satisfaction, the results of their study showed that an SIEs' individual subjective well-being is a important result of their expatriation experience.

In Cao et al. (2013) model, the intention to stay in a host country is described as future plans to remain in the host country. This intention is therefore considered a valid predictor of SIEs' future behaviours. In previous research, an individual's propensity for physically crossing organisational and/or geographical boundaries was positively linked to a protean career attitude (Briscoe and Hall, 2006:9). In any event, empirical studies have shown that this is

not always the case and the context of the career experience is critical (Briscoe, Hall and DeMuth, 2006, Baruch, Bhudwar and Khatari, 2007:101).

Using a developmental contextualism perspective, expatriation consists of active and intentional relations with different aspects of the SIE's micro- (e.g.family), meso- (e.g. organisation) and macro- (e.g. cultural) environments. SIE's with a strong protean career attitude select their environment based on their personal values and goals (Cerdin and Le Pargneux, 2009:9). They are curious about host country cultures, willing to interact with the new environment and show a high degree of personal agency in their expatriation (Cerdin and Le Pargneux, 2009:10). If these efforts are successful then these factors may ensure that SIEs remain in the host country (Tharenou and Caulfield, 2010).

Empirical results from Cao et al (2013:60) study indicate that protean career attitudes were positively related to cross cultural adjustment, career and life satisfaction and intention to stay in the host country, which were strong signs of satisfaction with and assimilation into the host country. As 80% of the sample in Cao et al. (2013) study was from a single organisation, the protean career attitude has positive outcomes for the organisation as well. In light of the dynamic and fluid state of the global business environment, more flexibility and adaptability is required from organisations and their employees (Deloitte, 2010). Employees that exhibit a protean career attitude may benefit the organisation by facilitating adaptability, flexibility and adjustment necessary at an individual level to meet these challenges. Further empirical studies are required to further clarify the role of a protean career attitude in organisations. As mentioned earlier in the chapter, this study attempt to answer this call by Cao et al. (2013) by using a mixed methodology to clarify the role of a protean career attitude in organisations, by using the PBCA scale (Briscoe et al, 2006) as well as interviews with line managers and HR specialists to explore the benefits, if any, of having SIEs with protean career attitudes at the university.

4.2.6 *Protean career attitude and career success*

Career success has been defined as “the accumulation and psychological outcomes that result from one's work performance” (Callanan, 2003:126). It has been used in one of two ways, firstly, objective career success and secondly, subjective or psychological career success (Ng et al. 2005). Objective career success implies objectively observable benefits received from a job or occupation such as salary, promotions, incentives (Cao et al, 2012). Subjective career

success suggests individuals' perception of success achieved in their careers and their assessment of their own achievements (Judge, Cable, Boudreau and Bretz, 1995). This is reflective of people's own sets of values, attitudes and goals in judging their career success.

To date few studies have focused on the impact of "Protean and Boundaryless" career attitudes on psychological or subjective career success (Enache et al, 2008; De Vos and Soens, 2008; Colakoglu, 2011; Verbruggen, 2012; Grimland, Vigoda-Gadot and Baruch, 2012; Cao, et al, 2012). This study hopes to add to the existing body of scholarship by addressing this knowledge gap.

Restubog, Bordia and Bordia, (2011:428) propose that line managers are accountable for delivering support and direction to individuals in their careers who have a potential to succeed. People want to feel successful at their jobs in terms of their aspirations, values and achievements. Heslin (2003) asserts that there are two ways of measuring subjective career success. The first is where people compare their own careers against their personal standards and aspirations (self-referent). Career aspirations are significantly related to subjective career success (Rasdi, Ismail, Uli and Noah, 2009). Males show a positive relationship between career aspirations and career success, while women do not (Dolan, Bejarano and Tzafrir, 2011). Abele, Spurk and Volmer (2011) propose that subjective success is the goal of a career. Career success has been theorised to give the individual a great sense of achievement and satisfaction (Aktar, 2010) and extrinsic career success is directly related to general mental ability (Judge, Klinger and Simon, 2010). Similarly, a study on the mediating effects of mentoring by Singh et al (2009) found that it has a predictive nature when it came to promotions and turnover intentions. Management tends to take career success at face value, using external markers like promotion/level on the hierarchy/salary and so forth. Nevertheless, Nabi (2000) in his study found that peer support was a significant predictor of career success. "Organisational support, a proactive personality and career management behaviours positively relate to career satisfaction, while career management behaviours mediate the relationship between proactive personality and career satisfaction" (Barnett and Bradley, 2007:617). These results are similar to those found by Cao et al. (2013) where those individuals with a protean career attitude experience career satisfaction too. People who are employed in a temporary capacity are less likely to engage in the social networks when than those who are permanently employed.

Zafar and Bint Mat (2012), using a sample of 160 academics from private universities in Punjab, examined the relationships between variables like protean career attitude, competency development and employability and the career success of these academics. Their results showed that, even in Pakistan with an ethnically distinct sample, there were still positive relationships established between the variables examined.

Cao et al. (2012) aimed to provide conceptual clarity by distinguishing SIEs from AEs assigned by the company and skilled migrants, introducing a framework based on career capital theory to explain SIEs' career success. In as much as the paper was theoretical, it allows future researchers to test the framework empirically in order to validate the impact of family and career-related factors within a more holistic approach. The framework proposed by Cao et al. (2012) includes SIEs from both developed and developing countries.

A study by Enache et al. (2008) examined the relationship between "Protean and Boundaryless" career attitudes and psychological career success. Their sample consisted of 150 respondents drawn from graduate and post-graduate students. Using hierarchical regression analysis, the results indicate that self-direction in managing and guiding one's career and vocational development is positively associated with psychological career success. In addition, it was found that organisational mobility preference is negatively associated with individuals' perception of success in their careers and their assessment of their career development. The study by Enache et al. (2008) also suggests that the relationship between values-driven predisposition and psychological career success is moderated by the perceived fit between the individual and the employing organisation. They also found that the impact of a boundaryless career attitude on subjective career success is mediated by the extensiveness of the internal and external networks or the extent to which an individual develops and enhances his or her social capital within and beyond the organisation's boundaries (Enache et al, 2008).

4.2.7 Other studies using protean career attitudes in an organisational setting

Zaleska and Menezes's (2007) study of protean career actors show that they have diminished organisational commitment. Hall (2004) argues that the attitude of organisational commitment has been replaced by attitudes of work satisfaction and professional commitment. Briscoe and Finkelstein (2009) are at this stage the only researchers to try to establish empirical evidence to support Hall's theory. However, they found no conclusive

evidence. Considering the fact that protean actors look out for opportunities for personal growth and development, the role of the supervisor becomes very important. Supervisors are the gatekeepers to organisational resources which protean actors would like to access. Hence it seems logical to assume then that career attitudes and organisational commitment is moderated by the perception of supervisor support (Briscoe et al., 2009). In the next section, the boundaryless career orientation will be discussed.

4.3 Boundaryless career orientation

Arthur and Rousseau's (1996) concept of the boundaryless career is not confined to a particular organisation nor does it necessarily have a linear sequence. Defining the boundaryless career, the authors state that it "does not characterize any single career form, but rather a range of possible forms that defies traditional career assumptions" (Arthur and Rousseau, 1996:3). Boundaryless careers can be seen as being the antithesis of 'organisational careers', careers that take place in a single organisation (Arthur and Rousseau, 1996:5). Arnold (2011) argues that these authors have portrayed boundaries as being undesirable as they box people into a particular job, choice, lifestyle and so forth. He questions this by contending that boundaries actually help people to create a necessary logical road-map that allows individuals to understand their career paths. Other authors have also criticised this concept for the following reasons: "the accuracy of the term "boundaryless career" as a label; the loose definitions of boundaryless career; the impact and disciplinary location of boundaryless career theory; the over-emphasis on personal agency in boundaryless career theory; the normalization of boundaryless careers; and the lack of empirical support for the emergence and prominence of boundaryless careers" (Inkson, Ganesh, Roper and Gunz, 2010:3).

The boundaryless career orientation is comprised of two dimensions, namely, physical mobility and psychological mobility (Sullivan and Arthur, 2006:19; Briscoe and Finkelstein, 2009). Physical mobility involves an employee's physical movement across boundaries from one job to another, one occupation to another, and similarly organisations and countries (Briscoe and Finkelstein, 2009:212). This idea helps to identify the desire to remain in a single organisation or an intention to move to another. The literature has suggested that those who are likely to engage in physical mobility do not enjoy the predictability of working for a single organisation for their entire careers. Seeking out employment opportunities elsewhere is believed to be a more beneficial than to stay where they are well known (Briscoe et al,

2006). Individuals who are physically mobile are driven by the quest for knowledge, personal development and a seeking out better remuneration (Briscoe et al, 2006:35)

Psychological mobility suggests boundaries of a psychological nature that only exists in the mind of the individual (Sullivan and Arthur, 2006:21). Psychological mobility is people are comfortable working with individuals from other departments or other affiliates (Sullivan and Arthur, 2006:22). This allows the chance for employees to augment their knowledge and skills as it allows access to other people's resources beyond the employing organisation. Psychological mobility involves being enthusiastic in the creation of active job satisfaction working with people outside the department or in another organisation, and a general outcome of being invigorated by new experiences and situations (Briscoe et al, 2006:32). What is important to note is that the assessment of success is personal, making the decision of success or failure up to the individual.

However, there are critics like Richardson and McKenna (2002) and Pringle and Mallon (2003), who caution against the positivist attitudes around the boundaryless career. Pringle and Mallon (2003:839) argue that "the concept has moved too far toward the individual's own agency and stereotypes the career patterns of white males who change from the bounded organisation to the boundaryless world of positive freedom and choice as a predictor of success, ignoring the variables of ethnicity/culture and gender". Sullivan and Arthur (2006) support this argument and suggest that these two factors could limit the 'boundarylessness' of career. In this study, gender will be examined in an exploration of the career attitudes of expatriate academics at UKZN, in South Africa. Even though ethnicity/culture is not directly examined as a variable of interest in the study, the majority of the sample is from African countries, in particular from SADC countries, as a result this could very well emerge as a mediating variable in this exploratory study.

4.3.1 *A model of boundaryless careers*

Sullivan and Arthur (2006:22) "suggest a definition of a boundaryless career as one that involves physical and/or psychological mobility". Thus the boundaryless career can be depicted as in Figure 4.3, with physical mobility along the horizontal continuum and psychological mobility along the vertical continuum.

Quadrant 1 shows low mobility on both the physical / psychological dimensions, careers here require a high level of expertise and context specific and have a low demand in most

economies except those with a specific need (Sullivan and Arthur, 2006:21). People who fit this profile are experts and show no desire to relocate, an example would be a scientist who has built a unique piece of equipment that only s/he can operate, on the other hand, this profile could also fit an unemployed unskilled person (Suutari and Brewster, 2000:417).

Quadrant 2 shows careers with high physical mobility and low psychological mobility (Sullivan and Arthur, 2006:21). It is important to note that the physical mobility is not selected by the person and but is rather reactive to the situational context. An example of this would be a secretary with a wide range of skills who can be dispatched to various organisations by a temp-recruiting agency, this profile would also fit trailing-spouses who have then to look for jobs that matches their personal skills set (Briscoe et al, 2006:31).

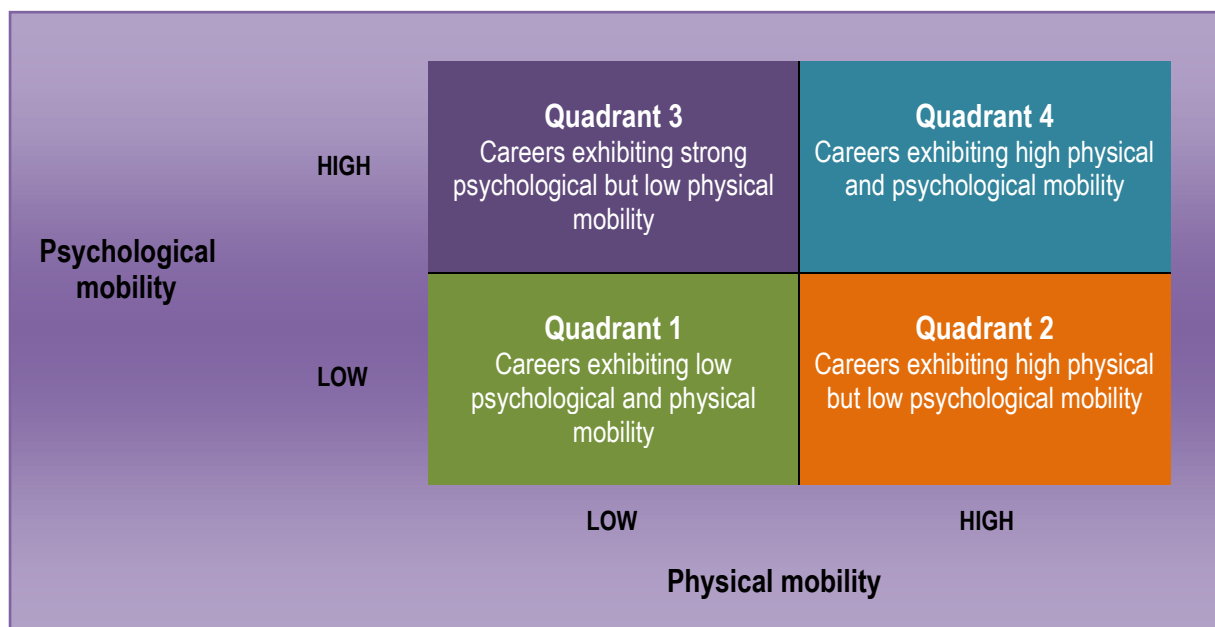


Figure 4-3 Two dimensions of boundaryless careers

(Source: Sullivan and Arthur, 2006: 21)

Quadrant 3 reflects careers with low physical mobility and high psychological mobility (Sullivan and Arthur, 2006:21). Individuals in this quadrant recognise opportunities for psychological career mobility while focusing on employability. These are normally highly skilled professionals such as visiting professors who travel to other institutions to deliver presentations but are employed by a single university, thus the physical boundaries are not comprised (Buchner, 2007:160).

Quadrant 4 reflects careers with high physical/ psychological mobility (Sullivan and Arthur, 2006:21). People who fit this profile regularly change jobs while simultaneously changing their psychological career orientation. An example of this could be an entrepreneur who

gains a wide range of experiences across organisations and job positions (Buchner, 2007:170).

Perhaps the major criticism of this model is that these wholistic groupings of particular characteristics of careers may or may not necessarily co-exist.

4.3.2 *Boundaryless career orientation and career success*

To date, few studies have examined the relationship between a boundaryless career orientation and career success. Verbruggen (2012:289) examined the effect of the two types of psychological mobility (boundaryless mindset and organisational mobility preference) on career success. In this study it was hypothesized that the relationship would be partially mediated by physical mobility. This relationship was tested amongst 357 business alumni from a large university in Belgium.

The results of this study illustrate that a boundaryless mindset was positively connected to objective career success (better wages and benefits, promotions) while the organisational mobility mindset orientation was related to fewer promotions, decreased job satisfaction and lower career satisfaction (Vebruggen, 2012:290). The study also found that the correlation between a boundaryless mindset and career success was somewhat facilitated by functional mobility (this is when people move to different departments in order to build experience in various work roles) while, organisational mobility preference influenced career success via organisational mobility (Vebruggen, 2012:296).

Colakoglu (2011) tested a model of in which career boundarylessness affects subjective career success through the three career competencies – knowing-why, knowing-how and knowing-whom – and career autonomy and career insecurity. This model was tested using MBA and EMBA alumni as well as current students in the United States. The results of this study provided empirical support for “the importance of career autonomy, career insecurity and the development of knowing-why and knowing-how competencies in the successful pursuit of a boundaryless career” (Colakoglu, 2011:49).

It is clear that the studies employing the boundaryless career model have taken place in Western societies (United States and Europe), therefore by employing the boundaryless career model in South Africa this study fills a gap in terms of the sample studied (SIEs, namely, expatriate academics) as well as its context.

4.4 “Protean and Boundaryless” career attitude

Briscoe et al. (2006) argue that until recently “Protean and Boundaryless” career models have served well in the wake of a new era of career development. Inkson (2006) refers to these models as a metaphorical compass allowing for more direction regarding what is to come in the world of work. However, very limited research has underpinned the constructs up to now. Briscoe et al. (2006) have created a credible and reliable scale, called the “Protean and Boundaryless” Career Attitude scale (PBCA) in order to empirically test the career attitudes of individuals. These scales are the assessment tool that this study will use in order to investigate the career attitudes of expatriate academics in the South African higher education context. The PBCA (Briscoe et al, 2006) will be discussed further in the chapter on methodology.

Briscoe et al. (2006) describe the “protean career model as involving both a values driven attitude and a self-directed attitude toward career management, as result of these career attitudes, individuals now use their own values as opposed to organisational values to guide their careers and might be more independent or self-directed when managing their careers” (Brisoe et al, 2006:32). The individual without a protean attitude is more likely to need external guidance in decision-making. The protean career attitude is closely related to the boundaryless career attitude. A person with this mindset participates in a career or working environment which has different levels of physical and psychological movement. With regard to psychological boundaryless attitudes, Briscoe et al. (2006:35) note that persons are different when it comes to their attitudes toward starting and following work-related relationships across organisational boundaries. This does not imply physical or employment mobility. For the person with a high boundaryless mindset, there is much enthusiasm about creating and sustaining relationships beyond organisational boundaries. Arthur and Rousseau (1996) include movement on a physical employment dimension.

Briscoe and Hall (2006) have combined the two concepts to explore the richness of the “Protean and Boundaryless” career. They developed 16 possible permutations that may be useful in classifying the “Protean and Boundaryless” career orientations in the South African context. These reflect either high or low values in terms of values- driven and self-directed aspects (representing the protean career profile) as well as psychological and physical mobility (representing the boundaryless career profile) (Briscoe et al, 2006:36). Briscoe and Hall (2006:16) describe eight permutations of profiles whose occurrence could be medium or

high. By examining the extent to which the orientation toward an individual’s career can be defined along “Protean and Boundaryless” dimensions, it becomes conceivable to discover the personal challenges the person may face in perserving the career status quo . Briscoe and Hall (2006:16) also address “the developmental challenges and opportunities relevant for the employing organisation, career counselor, support groups, partners, mentors and other parties interested in helping people with career development”. These are discussed further below. Other researchers have levelled a major criticism of these career profiles as a lack of empirical evidence to support these characterisations. While, the relevance of such criticisms is valid, this study utilises these profiles as markers to identify particular categorisations of academics as possessing high or low protean and boundaryless orientations thereby being able to identify the kind of organisational support best suited to allow for successful adjustment into the context of UZKN and South Africa. Table 4.1 will guide the discussion in terms of these career profiles. It becomes even more relevant when dealing with SIEs who present as highly skilled talent in a country (South Africa) where mathematical and scientific skills are necessary to enable the knowledge based economy to grow and develop. Particular categories from the table will be discussed in detail below.

Table 4-1 Career profiles of contemporary career agents

Hybrid category	Career actor’s personal challenge	Career actor and supporting groups’ career development challenge
Lost or trapped	React quickly to opportunities, survive	Clarify priorities, gain career management skills, expand perspective
Fortressed	Find stable, opportunities in predictable organisations that match values.	Broaden in terms of open-mindedness and self-direction. Otherwise, person and employers will suffer unless the person is a perfect fit for an extremely stable organisation.
Wanderer	Continuously has to find new rides to ‘hitch’.	Help develop self-direction, establish whether fit is good once this has been achieved.
Idealist	Finding organisations that match values, curiosity but do not require mobility.	Find challenges to push out of comfort zone and help build adaptability skills-in terms of mindset and working across boundaries.
Organisation man/women	Find stable organisation in which basic performance competence can be demonstrated.	Do not be seduced by performance ability. Increase self-awareness to make leader of high performer.
Solid citizen	Person-organisation fit a must Mobility a threat.	Maintain diversity of talent but leverage solid citizen’s contributions
Hired gun/hand	Identify and respond to best opportunities for providing services across boundaries.	Convert talented, reactive person into effective, self-aware leader with sense of priorities.
Protean career architect	Leverage capability into meaningful impact.	Provide stages on which to shine, learn and engage. Temper if needed.

Adapted from Briscoe and Hall (2006: 16)

4.4.1 The trapped/lost

People who may be classified as ‘trapped or lost’ are considered low in all four competencies. They lack of an inherent focus on their inner values (which could direct them) or on

boundaryless perspectives (which could uncover assorted options) thus, restricting them to limited opportunities over which they have no control thus they are forced to be reactive rather than proactive (Briscoe and Hall, 2006:16). The majority of the individuals in this category were male and belonged to the construction, manufacturing, transport and logistics or the internet/new technologies industries (Briscoe and Hall, 2006:16). According to Briscoe and Hall (2006:17) such individuals can be assisted by basic career development processes. It can be said that there is no empirical evidence that this grouping characterises a person's career behaviour as unconstrained individual action, it is remarkable how easily this concept like the others that follow have been accepted by researchers.

4.4.2 *The fortified*

The individuals categorised as 'fortified' have clear personal values, but the challenge is that they are inflexible in their ability to direct their own career behaviour and to recognise opportunities across physical and psychological boundaries (Briscoe and Hall, 2006:16). Here too, the ambiguity surrounding the use of the construct to classify a response to an unpredictable free-market economy has been neglected.

4.4.3 *The wanderer*

This is an individual who is boundaryless physically but not psychologically and who has low protean values, they are eager to take advantage of any opportunity that arises and who does not see organisational or national boundaries as a barrier in this quest (Briscoe and Hall, 2006:16). The limitation of these types of people is that they are controlled by opportunities rather than directing them (Briscoe and Hall, 2006:17).

In order for organisations to support such an employee, they need to provide chance to make their contributions richer and more effective (De Bruin and Buchner, 2009:79). Segers et al. (2008:213) found that in terms of industries, predominantly these individuals were found in the call center, education, health and social work and sales industries.

4.4.4 *The idealist*

The idealist defines a group of people who are very values driven and psychologically boundaryless, but who are not very effective in career self-management or in crossing

physical boundaries (Briscoe and Hall, 2006:17). According to Briscoe and Hall (2006:16), academics fall into this category. The challenge for the organisation is then to develop such employees so as to remove them from their comfort zone by emboldening them to manage their career more and to take advantage of the opportunities for physical mobility (Osland, 1995:12). This concept is unclear if it offers an analysis of observable behaviour or a cognitive state.

4.4.5 *The organisation man/woman*

Briscoe and Hall (2006:13) use the term “organisation man or ‘organisation woman’ to designate those who have a strong ability in taking charge of career management, but who are not terribly clear on their own values and who are also able to work well across boundaries psychologically, although not so willing to do so physically”. This perspective may prove dangerous for the individual and the organisation they work for as they may find outward success and recognition in fulfilling organisational goals but may never reach greater potential (to lead) because their own values have not been actualised nor relied upon therefore organisations may want to offer extra support and a buffer of reassurance so that risk-averse individuals will be willing to take such chances and anticipate genuine opportunities as a consequence (Briscoe and Hall, 2006:16).

4.4.6 *The solid citizen*

These individuals are both self-directed in career management and values driven and are psychologically boundaryless but are, for some reason, not physically boundaryless (Briscoe and Hall, 2006:16). The individual may be capable, well grounded, adaptive and curious but cannot leave the current organisational setting due to high unemployment in the field or some other restrictions thus these people stay within a stable context but can act if their autonomy, curiosity or values are challenged (De Bruin and Buchner, 2009:79).

Organisations need to be aware of their mobility limitations but also harness their considerable expertise, and to ensure that they are choosing and developing a diversity amongst employees should they wish to remain flexible, incorporating people with the aptitude for physical mobility as necessary for improved organisational performance (Briscoe and Hall, 2006:18).

4.4.7 *The hired gun/hired hand*

These individuals are completely boundaryless both physically and psychologically as well as being self-directed in their career management, however, they may not have a clear idea of how they can contribute to the organisation (De Bruin and Buchner, 2009:79).

The developmental challenge is to more fully inculcate the values dimension within such people thereby making it be possible to convince the person to become more of a self-leader and perhaps even a leader of others. Segers et al. (2008) observed that this profile was found more in the sales, telecommunication and finance industries. Typically more men than women were found in this grouping, with 3-10 years of experience and university degrees.

4.4.8 *The protean career architect*

This is someone who is psychologically and physically boundaryless, who is proactive about their career management and is motivated by personal values in the search to explain meaning and career success (Briscoe and Hall, 2006:18). In a recent study, a higher proportion of women were found to belong to this group and the majority of respondents were over 30 and had university degrees. These are people with principles, impartiality and wide exposure outside their geographical and psychological spheres and can be seen as leaders and can inspire others founded on their own values-driven outlook (De Bruin and Buchner, 2009:80).

Empirical studies that have used the PBCA (Briscoe et al, 2006), have explored the relationships between the PBCA and organisational support and the impact of supervisor support; they have also examined the relationships between the PBCA and the potential motivators for them, as well as the moderating effects of mentorship and gender on the PBCA in African countries. These studies are discussed below.

Cakmak-Otluoglu (2012:638) examined the correlation between the PBCA (Briscoe et al, 2006) and organisational commitment and if perceived supervisor support served to moderate this relationships. Respondents participated in a web-based survey consisted of 380 white collar employees who had a minimum of one year's experience in private sector organisations in Istanbul, Turkey. Results of this study indicate that organisational mobility is negatively related to all three dimensions of organisational commitment. SCDM was positively related to affective and normative commitment and negatively related to

continuance commitment, and VD career attitudes are negatively related to normative commitment (Cakmak-Otluoglu, 2012:638). Cakmak-Otluoglu (2012) reached similar conclusions to Briscoe and Finkelstein (2009:212) in that no substantial evidence was found to support the moderating effect of perceived supervisor support on the correlation between PBCA and organisational commitment, the most influential results were of perceived supervisor support on affective and normative commitment.

Segers, Inceoglu, Vloeberghs, Bartram and Henderickx (2008:212) examined the scales of the SHL Motivation Questionnaire (1992) compared to the underlying dimensions of the PBCA (Briscoe et al, 2006). The purpose of this study was to explore relationships between the “Protean and Boundaryless” career attitudes and the potential motivators for them. Using regression analysis, Segers et al. (2008:214) found that gender, age, education and managerial experience influenced motivator linked to the constructs of the PBCA. They then used cluster analysis to explore how many of the profiles could be observed when matching work motives to “Protean and Boundaryless” careers. Segers et al (2008:218) suggested that their study resulted in four motivational groups, namely, ‘protean career architects, trapped/lost, hired gun/hired hand, and curious wanderer’.

Okurame and Fabunmi (2013) examined the role of mentoring and the moderating effect of gender on the “Protean and Boundaryless” career orientation in an African country, that is, Nigeria, using a web-based questionnaire. The respondents were 250 Nigerian nurses. Results of this study found that mentoring support predicted protean career dimensions but were insignificant for boundaryless career dimensions, while gender moderated physical mobility in women it did not forecast the other measurable (Okurame and Fabunmi, 2013:78). The researchers also found that gender was a noteworthy moderator in the relationship between mentoring and the sub-scales of the PBCA including organisational mobility preference construct (physical mobility) (Okurame and Fabunmi, 2013:79). This study provides a uniquely African perspective on the dimensions of career attitudes presented by Briscoe et al. (2006). Thus the appropriateness of the PBCA concepts to more collectivist cultures seems suitable. The current study attempts to further validate the PBCA by examining the career attitudes of expatriate academics in South Africa as well as examining the potential relationships between the PBCA, motivation and the international career experience. It also serves to validate the PBCA in a different organisational setting, a university setting, UKZN. This study will also serve to test the PBCA in a multidimensional culture, to identify if the PBCA remains an appropriate measure of career attitudes. It also

serves to examine context as a mediating factor in the career orientation of expatriate academics in SA, rather than merely focusing on individual agency as the only influence on career orientation.

4.5 Career capital

Ackers (2008:411) argues that internationalisation has become a significant measure in career progression. He also argues that the more widely travelled the individual, the more competitive and highly sought after the worker becomes. This idea relates to the concept that expatriation confers on individuals five different types of human capital: scholastic, social, cultural, internal and external (Baruch, Bell and Gray, 2005:51). Social capital is the “stock of accumulated resources that one can access based on the relationships that can aid or be leveraged in accomplishing an end or furthering a pursuit” (Tymon and Stumpf, 2003:12). This is what Bourdieu (2008:51) posits as part of group membership, as it gives each of its members without the support of the collectivity-owned capital, a testimonial that entitles them with credit and further suggests that expatriation is seen as the source of external and internal capital, assisting in growing self-confidence, self-awareness, self-efficacy and market value amid a combination of intellectual capital and credibility in the labour market. Bourdieu (2008) sees these as a manifestation of global workers accumulated labour, which is essential to their career identity.

The findings of Cappellen and Janssens (2010:687) indicate that “people intentionally participate in career practices to deal with supposed organisational barriers in order to advance a career in the global economy”. It would appear from these findings that the highly skilled have more power to leverage their career choices and paths than those who are less highly skilled. Macdowell, Batnitzky and Dyer (2007) argue that highly skilled workers navigate class and status through mobility, and migration can be seen as a form of upward mobility, while simultaneously it is a struggle to legitimise some forms of capital (human or cultural) in a host country or with an any given employer. However, the movement of labour across temporal and special boundaries is not as easy as it has been made out to be, as international labour has to deal with international relations between home and host countries, national policies on immigration, border controls and international governance.

Given their status as SIEs, there is an implication that these employees have a high degree of agency as “they take advantage of the employment opportunities available in the global economy with a shortage of skilled workers” (Tharenou, 2008:183). Nevertheless, the literature on SIEs seems to posit a transience regarding the international mobility of SIEs, which according to Rodriguez and Scurry (2014) is problematic as it makes dangerous generalisations about this group. They call for “a more comprehensive understanding of how [SIEs] make sense of their careers within specific temporal and spatial frameworks” (Rodriguez and Scurry, 2014:192).

In contemporary career literature, there has been a shift to a more widespread notion of career capital, which seeks to identify a wider range of capabilities that global workers develop as part of the international experience (Singh et al, 2009; Cappellen and Janssens, 2010; Inkson and Thorn, 2010). These capabilities have been classified as the three ways of knowing, namely, ‘knowing why’, ‘knowing whom’ and ‘knowing how’. ‘Knowing why’ is related to personal motivations to pursue a selected career path; in the case of SIEs it is related to what motivates their decisions on whether and where to go (Carr, 2005). ‘Knowing whom’ is linked to the relational and professional networks, such as meeting professional colleagues who may assist in career advancement; these networks create the opportunity to develop human capital (Jones and Defillipi, 1996). ‘Knowing how’ refers to investments in explicit knowledge, skills and expertise (Jokinen, Brewster and Suutari (2008). Jones and Defillipi (1997:119) argue that the value of the above competencies is “dependent on [individuals] being employed in settings that recognise their potential contribution and provide corresponding opportunities”.

It is widely acknowledged that international experiences of traditional expatriates, related learning and the challenging of one’s capabilities may strongly influence a person’s self-concept, motivation and interests regarding their future careers (‘knowing why’) (Suutari, 2003). Results of a study by Jokinen et al. (2008) comparing traditional expatriates and SIEs indicate that international work experience is an important learning experience for a person’s identity, self-concept and development with both groups of expatriates. Respondents indicated that their international work experience had changed their competency levels (‘knowing how’, ‘knowing why’, ‘knowing whom’) and that they were empowered to accept more challenging international opportunities in future. Their self-awareness and future career paths had definitely changed as an outcome of their international work experience.

An examination of the motivation for expatriation to Qatar was not based on the need for the accumulation of career capital, as other literature has suggested. Rather, the motivation seems to be linked to “moving somewhere different” and “seeing the world” (Rodriguez and Scurry, 2014:199). Participants positioned their motivation in the ‘knowing why’ competency in connection with a career plan. There were negative connotations to the experience in terms of awareness of lack of development of competencies and networks. However, this seemed not to trouble these SIEs as they felt that their presence in Qatar would be sufficient to fulfill their goal of cosmopolitanism and that enduring the barriers of the restrictive environment of Qatar would somehow make them develop their international experience. The latter dealt mainly with cultural characteristics like appreciating new cultures, empathising with various value systems and travelling to new places.

4.6 Conclusion

In this chapter, the international career experience has been situated within the ‘contemporary careers framework’. Both “Protean and Boundaryless” career orientations have been examined from an empirical as well as a theoretical perspective. The importance of possessing a protean career attitude as well as a boundaryless career orientation for SIEs in order to ensure career success has been argued. An empirical overview of the PBCA (Briscoe et al, 2006) has been presented as this is the instrument used in this study to examine the career attitudes of this particular group of SIEs, expatriate academics in SA. A theoretical overview of the 16 different career profiles individuals can present using the PBCA (Briscoe et al, 2006) have been explored in order to identify the career profile those academics in the sample present, this was done in order to establish the best possible support management can offer in order to ensure career success. This chapter has served to identify the gaps this study addresses in the current scholarship; firstly, the context of the study is unique, in that a paucity of studies currently exists on career attitudes of employees in an SA context. Secondly, the PBCA (Briscoe et al, 2006) has been used to examine the career profiles of a unique sample, expatriate academics, more importantly mainly African academics, as the scale has previously been used on mainly Western and European samples. Finally, the career orientations identified by the PBCA (Briscoe et al, 2006) has been used to assist in the design of the Global Talent Management Model that aims to provide tailor made organisational support from a management perspective to those expatriates in the employment of UKZN. In

the next chapter the research methodology covering the aims and objectives of the study, research design, sampling selection procedure and description, as well as the research instruments are presented.

Chapter 5

Research Design and Methodology

5.1 Introduction

The aim of this chapter is to outline the research methodology of the study. Whilst the preceding chapters covered the conceptualisation and theoretical aspects of the study, this chapter focuses on the research methodology used in gathering the data for the study. The discussion encompasses the aims and objectives of the study, research design, sampling selection procedure and description, as well as the research instruments that were utilised.

The main goal of the study is to undertake an investigation into a relatively unknown area of research; therefore the research is investigative in nature. It is also descriptive as it “attempts to describe a relatively unknown area of research accurately through narrative type descriptions and classification” (Durheim, 2006:44). The population of interest is expatriate academics, defined as staff members whom were not born in South Africa and who are academics that is, they are involved in both teaching and research activities at the University of KwaZulu-Natal (UKZN).

5.2 Research problem

According to Momberg (2008:12), the “greatest impediment in South African organisations is the country’s acute shortage of skills, in particular scarce skills in fields such as mathematics and the sciences”. Momberg (2008) further submits that a similar problem is also prevalent in the higher educational sector. As a result, this problem could impact negatively on the future operations of higher educational institutions, if urgent solutions are not forthcoming. Those overseeing higher education in SA, therefore, need to devise strategies for responding positively to the problem of a skills shortage and more especially scarce skills, in order to keep the doors of higher learning open.

The study addresses one of the solutions proposed by the South African government, that is, bringing in foreign talent in order to compensate for the skills shortages in the country,

particularly in the scarce skills disciplines, both in industry and in higher education. The policies that address this need are the the Joint Initiative on Priority Skills Acquisition (JIPSA) as well as the National Development Plan 2030 (NDP) (The Presidency, 2006).

The study attempts to unpack the reality of the situation in higher education by examining the demographic profile of academics at the country's higher education institutions and in particular UKZN, illustrating by the use of a case study the motivation, career experience and career orientation of those academics coming into South Africa. The study examines the career experience of expatriate academics at UKZN, both from an individual and organisational perspective. It is unique as it examines the challenges and opportunities associated with an international career experience from the perspective of two organisational stakeholders namely, their academic line managers as well as HR specialists. The study fills a gap in the literature regarding a relatively under-researched area in South Africa and will assist in identifying the challenges faced by these academics and the opportunities they present in the South African higher education arena, in order to facilitate the attraction and retention of this scarce human capital.

5.3 Focus of the research

The primary purpose of this study is to examine the profile of academics in South African higher education by analysing SA academics in relation to expatriate academics, as well as the motivation of expatriate academics for relocating to SA and their experience of expatriation at UKZN. A secondary purpose is to evaluate their international career experience from an organisational perspective (line managers and HR specialists), in order to analyse the challenges and opportunities perceived during the career experience, and to create strategies that can be used to enhance the overall expatriation experience of expatriate academics, in order to attract and retain this scarce human capital.

5.3.1 Research aims

Thus, the following research aims were identified:

Aim 1: To investigate the staffing trends amongst academics at South African Higher education institutions over three years 2005/2010/2012

Aim 2: To explore the nature of the international career experiences amongst expatriate academics at UKZN

Aim 3: To evaluate the nature of the international career experience from the perspective of organisational stakeholders at UKZN

5.3.2 Research objectives

1. To investigate the demographic profile (age/gender/qualification/country of origin) of expatriate academics in South African higher education institutions over three years (2005/2010/2012)
2. To categorise the ranking of South African higher education institutions in terms of the number of expatriate academics employed and their countries of origin over three years (2005/2010/2012)
3. To compare and contrast South African academics with expatriate academics in terms of qualifications, age and gender over three years (2005/2010/2012)
4. To compare and contrast South African with expatriate academic staff at UKZN in terms of age, gender, qualification, field of study and level of academic post for 2005/2010/2012
5. To determine the motivating factors that led to the decision to relocate among expatriate academics at UKZN
6. To investigate expatriate academics experiences of organisational and social support during expatriation at UKZN
7. To evaluate the career orientation of expatriate academics at UKZN
8. To determine whether demographic factors such as age, gender, location of expatriate academic's family, years of experience as an academic, duration of expatriation experience and field of study influence expatriate academic's motivation to expatriate, international career experience and career orientation at UKZN
9. To explore whether there is a relationship between expatriate academic's motivation to expatriate and their international career experience, their motivation to expatriate and career orientation and between their international career experience and career orientation at UKZN
10. To examine the challenges and opportunities associated with the management of expatriate academics as perceived by their academic line managers
11. To investigate the nature of the expatriation experience of expatriate academics from the perspective of HR specialists

5.4 Research design

Saunders, Lewis and Thornhill (2009:136) describe ‘the research design as the general plan of how you go about answering your research questions’. Cresswell (2009:3) explains that “research designs are plans and procedures for research that span the decisions from broad assumptions to detailed methods of data collection and analysis”. Burns and Grove (2003:195) define “a research design as a blueprint for conducting a study with maximum control over factors that may interfere with the validity of the findings”. Parahoo (1997:142) describes a research design as “a plan that describes how, when and where data are to be collected and analysed”. Therefore, in this section, the research paradigm, triangulation, study site, and target population of the study is discussed.

5.4.1 Research paradigm

As this study aimed to investigate the research phenomenon thoroughly, the researcher chose to adopt what is termed in the literature as the “pragmatic worldview, with researchers adopting this worldview, there is a concern for applications, in other words, what works and also with solutions to problems, instead of focusing on methods, that is, quantitative or qualitative, researchers emphasise the research problem and use all applications available to understand the research problem” (Cresswell, 2009:10).

The purpose of any research study can either be exploratory in nature or descriptive or it can be conducted to test hypotheses (Saunders et al., 2009). Many studies can and often do have more than one of these purposes; however, each has different implications for other aspects of research design.

5.4.1.1 Exploratory studies

This type of study typically occurs when a researcher becomes interested in a new topic or when the subject of study itself is relatively new. Robson (2002:59) describes “exploratory research as a valuable means to find out what is happening; to seek new insights and to assess phenomenon in a new light”. Saunders et al. (2009:45) explain that “exploratory studies are critical for getting clarity on the phenomenon of interest and enriching the literature through subsequent theory building and hypothesis testing”. Studies are only exploratory in nature if the knowledge regarding the phenomenon is scant and a deeper understanding is sought (Sekaran and Bougie, 2010).

According to Sekaran and Bougie (2010:105), exploratory studies are undertaken for three main purposes:

- “to satisfy the researcher’s curiosity and desire for better understanding,
- to test the feasibility of undertaking a more extensive study, and
- to develop the methods to be employed in any subsequent studies”.

This research is exploratory in nature as it undertakes to study a relatively under-explored phenomenon in South African higher education, namely the career experiences of expatriate academics.

5.4.1.2 Case studies

Numerous authors (Saunders et al 2003; Terreblanche, Durheim and Painter, 2006; Sekaran and Bougie, 2010) of case study methods discuss a variety of paradigmatic perspectives. A discussion of the most commonly held perspectives will follow. Yin (2014) guides that case study research must have five components. The first three elements, namely explaining the research questions, research intention and denomination allow the researcher to recognising the data to be collected. The latter two elements, that is explaining the thinking behind the relationship between the data and the research intent and the conditions for inferring the findings allow for the design of the case study to advocate the course of action once the data has been gathered.

Stake (1995, cited in Zucker, 2009) argued that the number and kind of case study adopted was contingent on the reason for the investigation. Yin (2014) argues that if in the proposed study, research questions involve ‘how’ and ‘why’ questions or more exhaustive descriptions of some social event then case studies are the ideal mode of inquiry. Stake (1995, cited in Zucker, 2009:6) pointed out that the researcher in a case study design could be described as a biographer as they concentrate on a particular stage in the life of a person or event. For the purposes of this study, a case study research design was followed as the researcher wished to fully examine the experiences of a group of unique individuals who are expatriate academics in terms of their motivations and their experiences, as well as to look at their experiences from a organisational perspective, that is, from the perspective of line managers and HR specialists.

Using a case study design is especially valuable when the researcher aims to develop a deeper comprehension of the background of the study and the procedures concerned, thus it is particularly useful in exploratory and explanatory research (Zucker, 2009). The data collection methods used in a case study may be various and may be used in conjunction with one another, in other words, triangulating multiple sources of data. This method is often used within one study in order to ensure that the data are saying what the researcher thinks it is saying.

5.4.2 *Triangulation*

The primary philosophy of mixed methods research is that of pragmatism. Johnson, Onwuegbuzie and Turner (2007:112), define mixed methods research as “an approach to knowledge (theory and practice) that attempts to consider multiple viewpoints, perspectives, positions, and standpoints (always including the standpoints of qualitative and quantitative research”. Therefore pragmatism as a theoretical framework does not subscribe to one particular philosophy and thus is well suited to mixed methodology as researchers have the liberty to select either quantitative and quantitative designs when they perform research, so as to gain an in-depth understanding of the subject at hand (Johnson et al, 2007). There have also been calls in the expatriate management and career management disciplines for interdisciplinary research in career theory by Herr (1987, cited in Hudson, 2004:84), and for the relinquishing of restrictions and divisions between qualitative and quantitative designs.

Each research design has inherent limitations, for example, using telephonic interviews in a qualitative research design does not allow the interviewer to observe subtle kinesthetic nuances of the respondents such as facial expression, body language and gestures. Face-to-face interviews also have their disadvantages in that they can be expensive, especially if respondents are geographically dispersed, and responses can be influenced by interviewer bias. The results of this type of research design cannot be generalisable to other contexts and can be a very time consuming exercise (Sekaran and Bougie, 2010; Saunders et al.,2009). Similarly, in quantitative research, the collection of in-depth ‘rich’ data on the causal factors influencing a particular phenomenon may not be possible, based on the inflexibility of the structure and categorisation of responses in the questionnaire. Also, the significant relationships that maybe discovered through hypothesis testing may not necessarily be causal relationships. Sometimes data may be difficult to gather from participants using a structured questionnaire, because of the sensitive nature of the phenomenon under study. Often

participants in a self-reporting questionnaire may not respond honestly and as such may provide inaccurate and incomplete information. Data gathering through questionnaires, especially email questionnaires have a notoriously low response rate that may negatively influence the outcome of the study (Sekaran and Bougie, 2010; Cresswell, 2009). Therefore the research decided to adopt a mixed methods approach in order to compensate for the inherent limitations of these methods as well as to build on the strengths of each in order to enhance the holistic understanding of a relatively new and under-researched phenomenon in South African higher education.

According to Cameron and Molina-Azorin (2011), the field of business and management studies has not adopted mixed methods research as enthusiastically as other academic disciplines. This study therefore addresses the call by researchers in the field of business and management such as Cameron and Molina-Azorin (2011), Currall and Towler, (2003) and Molina-Azorina (2007) to engage in mixed methods research. This approach was deemed to be relevant in this study as it allowed the researcher the freedom to thoroughly investigate a multidisciplinary phenomenon, namely, the motivation, and international career experience as well as the career orientation of expatriate academics at UKZN. This is done both from an individual and organisational perspective.

Krivokapic-Skoko and O'Neill, (2011) argue that mixed methods research has the ability to supply new perspectives into and augment the understanding of the event being researched. Denzin (2012:82) has defined "triangulation as the combination of multiple methodological practices, empirical materials, perspectives, and observers in a single study [which] is best understood as a strategy that adds rigor, breadth complexity, richness, and depth to any inquiry". Thus, researchers can improve the accuracy of their assessments by collecting different kinds of data relating to the problem being researched. The basic principle of triangulation is that all methods have fundamental predispositions as well as restrictions, so by using only one method to measure a problem will undoubtedly lead to predisposed and limited outcomes (Tashakorri and Teddlie, 2010).

In the social sciences, the use of triangulation can be traced back to Campbell and Fiske (1959), who developed the idea of 'multiple operationism'. They argued that "more than one method should be used in the verification process to ensure that the similarities and differences reflected in the findings are based on the problem being investigated and not because of the method being used to investigate it" (Campbell and Fiske, 1959:89). The use

of a variety of triangulation designs share a common premise in that the limitations of one method should be balanced by the vigour of the other (Olsen, 1999, cited in Holborn, 2004:16).

Triangulation provided researchers with several benefits. These included, the improvement of the reliability of the research data, developing creative methods of grasping a phenomenon, discovering distinctive results, defying or combining theories and thereby offering a firm grasp of the problem (Thurmond, 2001). The main reason for this was the range of data that can be used in the analysis. Therefore by combining interviews and questionnaires, complexity was added to the outcomes of the research that would otherwise not have been possible using a single methodology, thereby escalating the validity and utility of the findings (Thurmond, 2001).

One of the primary disadvantages of triangulation is that it can be time consuming. Collecting more data requires greater planning and organisation as resources may not always be available to researchers (Thurmond, 2001; Tashakkori and Teddlie, 2010). Guion, Diehl and MacDonald (2002) describe various types of triangulation available to researchers; Figure 5.1 illustrates the interactions between types of triangulation used in this study:

- *Data triangulation*: Information was collected from three different sources in this study, namely, archival data from the Higher Education Management Information Systems (HEMIS) and the Data Management Information systems of UKZN (DMI) as well as quantitative and qualitative data from personnel at the university.
- *Methodological triangulation*: A mixed methods approach was used to collect information on expatriate academics, Firstly, data were collected from archival databases, like HEMIS and the DMI; secondly, using a questionnaire, information was collected from the sample of expatriate academics selected for the study; and, thirdly, interviews were used to collect information from those responsible for the operational management of the expatriate academics and from those who were involved in the recruitment, selection and administration of expatriate academics, namely, the HR specialists at UKZN.
- *Theoretical triangulation*: Extensive reviews of the literature in different disciplines, namely, expatriate management, career management and academic mobility of the highly skilled, have been brought together in a multidisciplinary study.

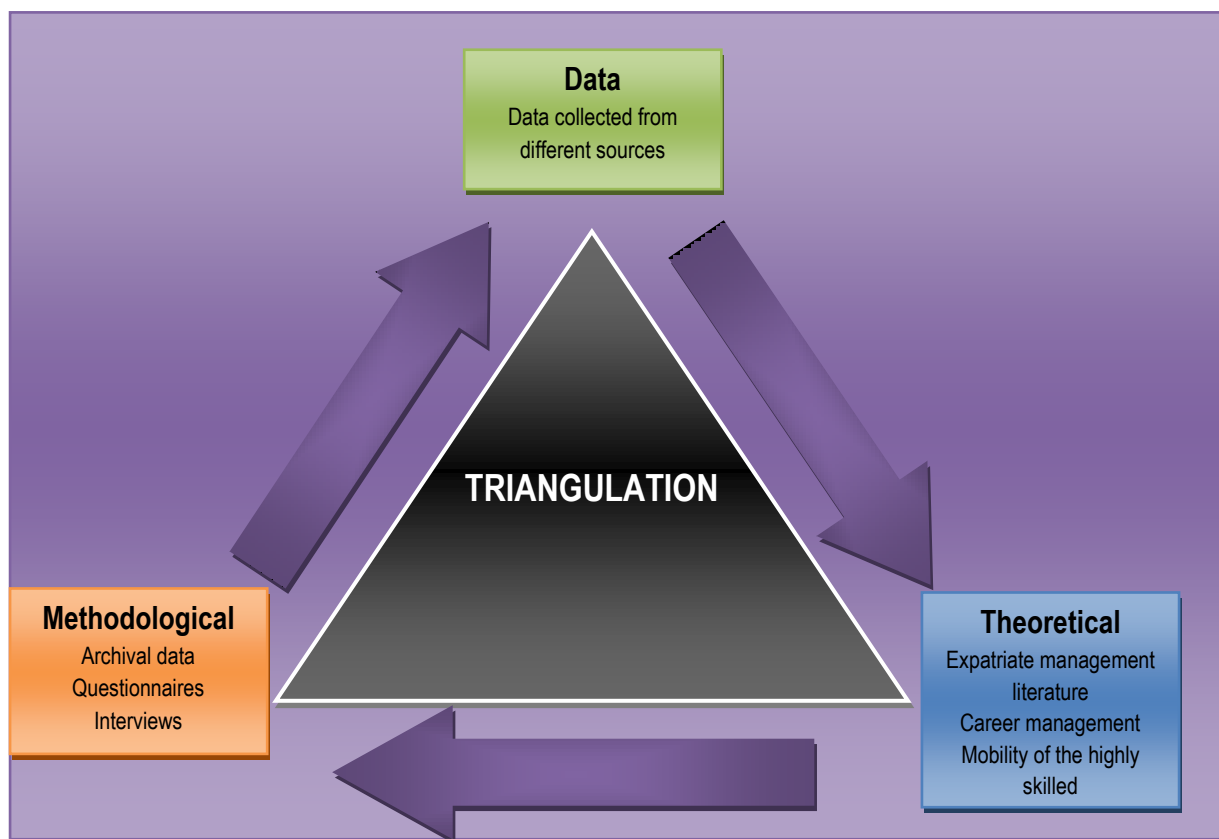


Figure 5-1 Types of triangulation used in the research design of this study

5.4.3 Study site

UKZN is a higher education institution located in the province of KwaZulu-Natal in South Africa; its vision is to be the “premier university of African scholarship”, its mission is “to be a truly South African University that is academically excellent, innovative in research, and critically engaged in society” (UKZN, 2014). The University of KwaZulu-Natal underwent a merger in 2004 between the former University of Natal and the former University of Westville. The institution now comprises five main campuses, namely, Westville, Howard College, Pietermaritzburg, Nelson R. Mandela School of Medicine and Edgewood campuses. As such, UKZN encompasses many faculties and departments, different job categories, as well as diverse student body and workforce including local and international academic and non-academic staff.

5.4.4 Target population

Saunders et al. (2007: 606) define “a population as a complete set of cases or group members”. The target population of this research project was all expatriate academic staff employed at the various departments at UKZN, as well as the organisational stakeholders

responsible for managing them at UKZN, namely their academic line managers and HR specialists.

5.4.5 Overview of research methodology

This study employed a case study design using mixed methodology, which includes secondary data collection, a self-designed questionnaire and personal interviews (see Figure 5.2 for a graphic representation of this). The study uses both quantitative and qualitative approaches which when combined increases the power of the study far more than if it were a single methodology study (Cresswell, 2009). Greene et al. (1989:256) define “mixed-method designs as those that “include at least one quantitative method (designed to collect numbers) and one qualitative method (designed to collect words), where neither type of method is inherently linked to any particular inquiry paradigm”.

A sequential mixed-methods procedure was adopted for the purposes of the study. This was done so as to allow the researcher could enhance the findings of one methodology with another (Cresswell, 2009). Thus, this study began with a collection of secondary data to investigate the number of expatriate and South African academics employed in the South African higher education sector followed by secondary data collection at UKZN from academics, both expatriate and South African, employed over the three years over three years 2005/2010/2012 these two components made up Phase 1 of the study. This was then followed by the development of and analysis of a self-designed questionnaire was circulated to those staff who met the criterion specified for the sample parameter, this made up Phase 2 of the study. Thereafter, interviews were conducted with line managers of expatriate academics and HR specialists to further investigate the experiences of expatriate academics at UKZN (Phase 3). This sequential mixed-methods procedure, illustrated in Figure 5.2, is described in detail in the next section of this chapter.



Figure 5-2 The mixed methods research methodology adopted for the study

5.5 Phase 1: Secondary data collection

The secondary data are those which have already been collected by someone other than the researcher. Secondary data can be collected directly either from published or unpublished sources. Durrheim (2006) warned against taking published data as accurate without being aware of their significance and constraints and he advised to always be critical of such publications. Close examination of secondary data are critical as it just might be possible that the data may be inaccurate, inadequate or even unsuitable for the purposes of investigation. Therefore, secondary data should be reliable. In order to test the reliability of the data, Durrheim (2006) suggested that cause for the categorisation of the data, the scale and goal of the of the investigation, the units of measurement adopted in the research and the length of time dedicated to the study should all be taken into consideration when determining the reliability of the data. Durrheim (2006) goes further to argue that the nature of the inquiry, whether the anticipated level of accuracy was achieved and the equivalence of the data collected to other existing formats was also paramount in establishing the reliability of secondary data.

In order to achieve research Aim 1 of this study, namely, to examine the staffing trends amongst academic staff at South African higher education institutions, secondary data regarding SA academics and expatriate academics were collected in terms of age, gender, qualification and country of origin with permission from the HEMIS system run by the Department of Higher Education and Training over three years 2005/2010/2012. Secondary

data review and analysis involves collecting information, statistics at various levels of accumulation in order to allow the researcher to create a situational analysis of the current trends in SA higher education, in terms of inflows of expatriate academics and their role in stemming the skills crisis. The official verified statistics collected by HEMIS, the government database for statistical information in higher education was approached concerning the staffing profile of permanent academic staff at public higher education institutions in South Africa. The population consisted of permanent academic staff at public higher education institutions and as this was information gathered from a reliable and verified source, all participants formed part of the sample examined. Unfortunately the statistics for 2013 was not available from HEMIS at the time of submission of the final documents for the study. Descriptive and inferential statistics were used in order to analyse the data collected.

Next, in order to investigate the profile of academics, both South African and expatriate, employed at UKZN, secondary data were collected from DMI which is the official management database at UKZN over three years, 2005/2010/2012. Data were collected from the population of permanent academic staff at UKZN using the variables of gender, age, country of origin and qualification. In terms of the sample of expatriate academics the field of study and level of academic post was also investigated. Once again, descriptive and inferential statistics were used in order to analyse the data collected. This is illustrated in Figure 5.3.

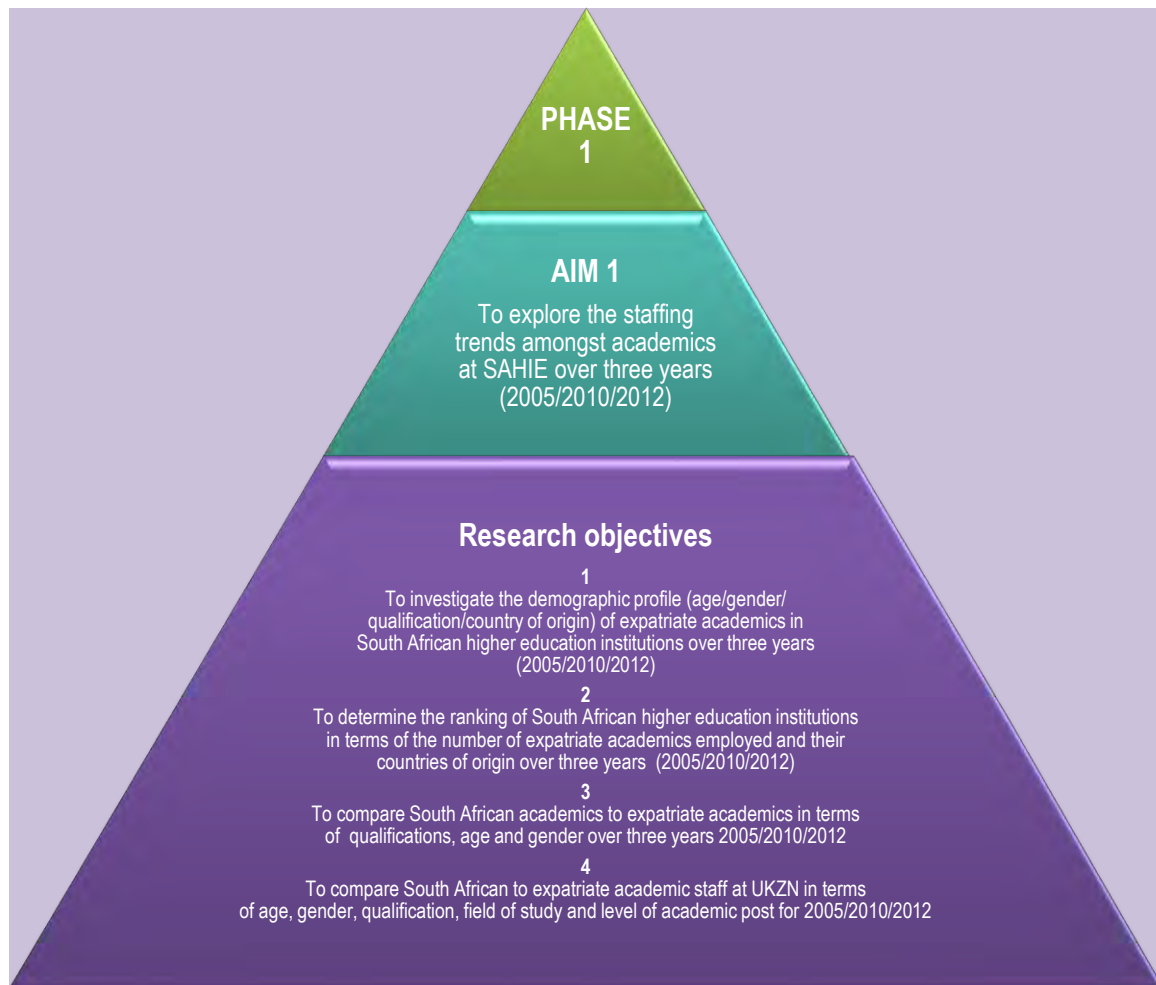


Figure 5-3 Research design of Phase 1 of the study

5.6 Phase 2: Quantitative phase

One of the most pertinent issues researchers have to consider when designing a quantitative research project is the type and number of people participating in the study. In this context, a few important questions come up, such as (Sarantakos, 2005:39):

- “Will the entire population or a sample be studied?”
- If a sampling technique is selected, which procedure is most suitable for the project?
- How large should the sample be?
- Is a sampling frame required?
- How will possible problems, errors and distortions be prevented?
- How will non-response be dealt with?
- Are there any issues of ethics and objectivity to be considered?”

The answers to these questions are many and diverse. While it may be conceivable to perform a complete poll of the population, researchers hardly ever do so. Contacting the whole population would be difficult, costly and time consuming. “Sampling saves time and money; this is critical when one has tight deadlines. Properly selected samples provide information that is sufficiently accurate in research decision-making” (Sarantakos, 2005:45). Choosing a sample according to scientific guidelines so that it is a true reflection of the population, the findings can be generalised to the entire population (Stuwig and Stead, 2004).

5.6.1 Sample and sampling technique

In this section, the sample and sampling technique used in Phase 2 of the study are described. “What constitutes an expatriate academic is permeable and unstable rather than fixed with clearly demarcated boundaries” (Richardson, 2002:10). Further complications arise from the ambiguity of related concepts such as ‘sojourner’ (Osland, 1995) and ‘migrant’ (Hoffman, 2007; Locke, 2007) and the boundaries between expatriates, migrants and sojourners are also unclear.

Definitional complexity notwithstanding, the parameters of the study have to be established. Thus, for these purposes, “expatriates are understood as those people who are living in an overseas country on a temporary basis, but for more than one year” (Richardson, 2002:12). Academics are understood as “professors and non-professorial staff, the latter only as far as [they are] part of the research and teaching profession” (Karpen, 1993:42). To some extent arbitrary, although based on previous published research in the field, a “minimum length of stay of one year and a maximum of 10 years” has been used by Richardson (2002:11) in her study of expatriate academics. The parameters set by Richardson (2002) have been adopted in this study also.

By comparison with expatriates, ‘migrants’ are understood as people who have relocated to an overseas country on a permanent basis. They would, therefore, not have the same issues as expatriate academics who are there with the intention of perhaps one day relocating to another country or returning home. ‘Sojourners’ are there for only a brief period of time, roughly less than one year. They elect to go independently and are not on a sabbatical or exchange between universities. Thus their issues too would be of a transient nature as compared to those who meet the parameters of this study that is, being in the country for more than one year but less than ten (Osland, 1995; Richardson, 2002; Hoffman, 2007;

Locke, 2007). Based on the definitions of the different types of international career experiences above, the decision to select those with a period of stay in South Africa from one to ten years allowed the researcher to target those with the relevant experience with the kind of issues being explored in this study.

Therefore, for the purposes of the research, expatriate academics are defined as those who are foreign by birth and currently employed at UKZN, for a minimum period of one year to a maximum period of ten years.

5.6.2 Sampling technique in the quantitative phase

The sampling technique used in the quantitative phase of this study was non-probability sampling, as the objective was to gather pertinent information obtainable from certain individuals (Sekaran and Bougie, 2010:276). The information required by the study could only be provided by a special group of faculty, that is expatriate academics, and therefore purposive sampling was needed along with judgement sampling comprising of selecting participants who were strategically placed so as to supply the information needed (Sekaran and Bougie, 2010:277).

During the data collection phase, challenges were encountered in accessing expatriate academic staff due to a general mistrust of the purpose of the research. Therefore, the methodology was adapted to use snowball sampling; thus, once feedback had been successfully received from a respondent, the researcher then asked that respondent to identify other respondents to approach, thereby increasing the number of respondents in the sample with less difficulty.

The population of expatriate academics at the University of Kwa-Zulu Natal (UKZN) at the time of the field work was 270. However, only 120 of these foreign academics met the parameters of the sample, namely that they have been employed at UKZN for a period of 1-10 years, and were engaged in teaching and research activities.

5.6.3 Data collection method: Design of the questionnaire

In Phase 2 of the study, in order to achieve research Aim 2 of the study (see Figure 5.4); a self-designed questionnaire was devised consisting of questions covering:

- motivation to relocate (Research Objective 5)

- the experience of organisational and social support during expatriation (Research Objective 6), as well as
- the PBCA, developed by Briscoe et al. (2006:16), in order to explore the career attitudes of expatriate academics (Research Objective 7).
- research objective 8 and 9.

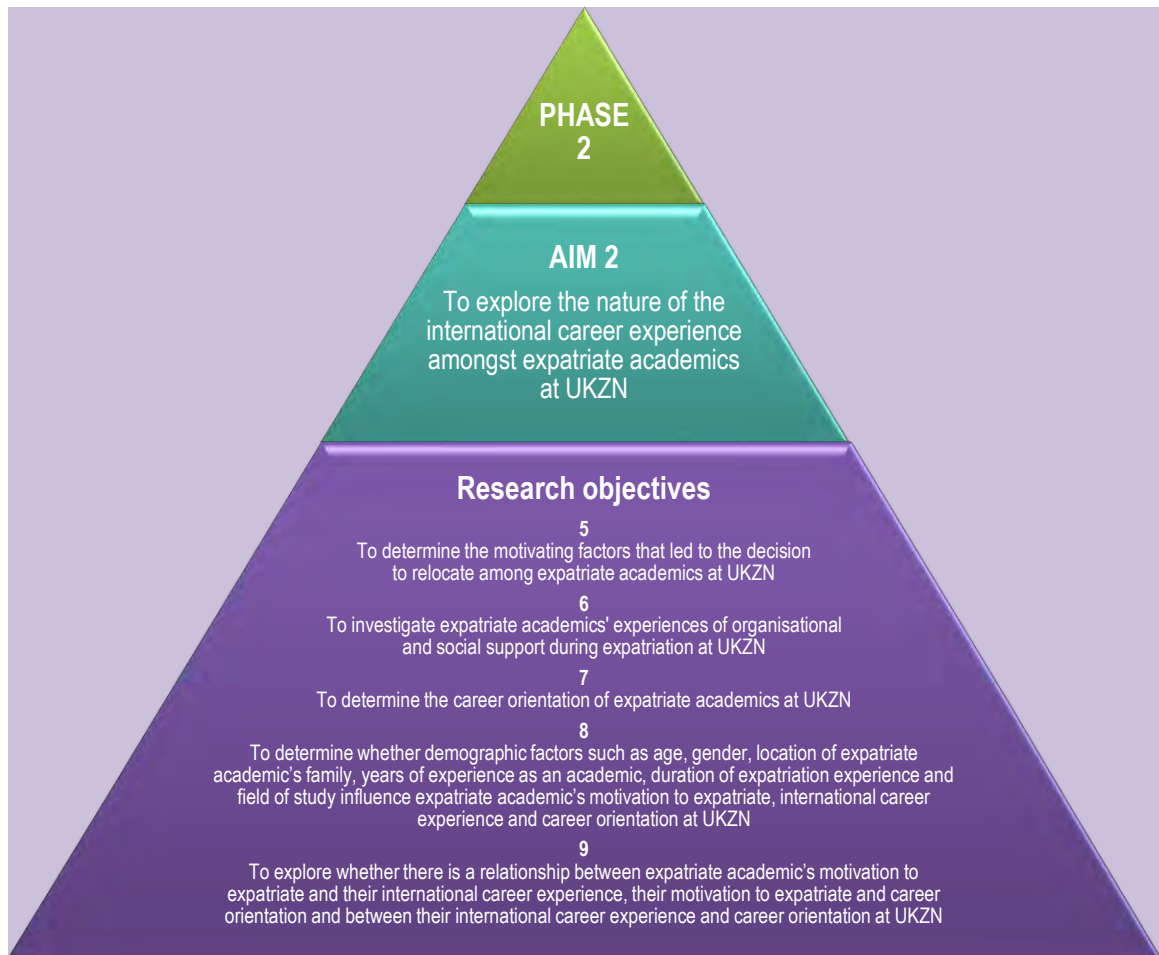


Figure 5-4 Research design of Phase 2 of the study

The self-administered questionnaire called “The Career experiences of Expatriate Academics at UKZN” was designed by reviewing existing assessment instruments in the area of academic mobility and expatriate management literature.

According to Cavana, Delahaye and Sekaran (2000:227), when designing questionnaires the focus should be on the following three factors:

- “the way the questions are worded
- planning the questionnaire in such a way as to enable the variables to be categorised, scaled and coded after receiving the responses, and
- the general layout and appearance of the questionnaire”.

These factors are illustrated in Figure 5.5.

May (2006:127) argues that research is a time-consuming, painstaking and often expensive exercise. Taking this into consideration in the designing the questionnaire, the researcher needs illicit as much information as possible and to maintain the clarity and simplicity of the questions. Next the researcher needs to ensure participants are open and honest when completing the questionnaires.

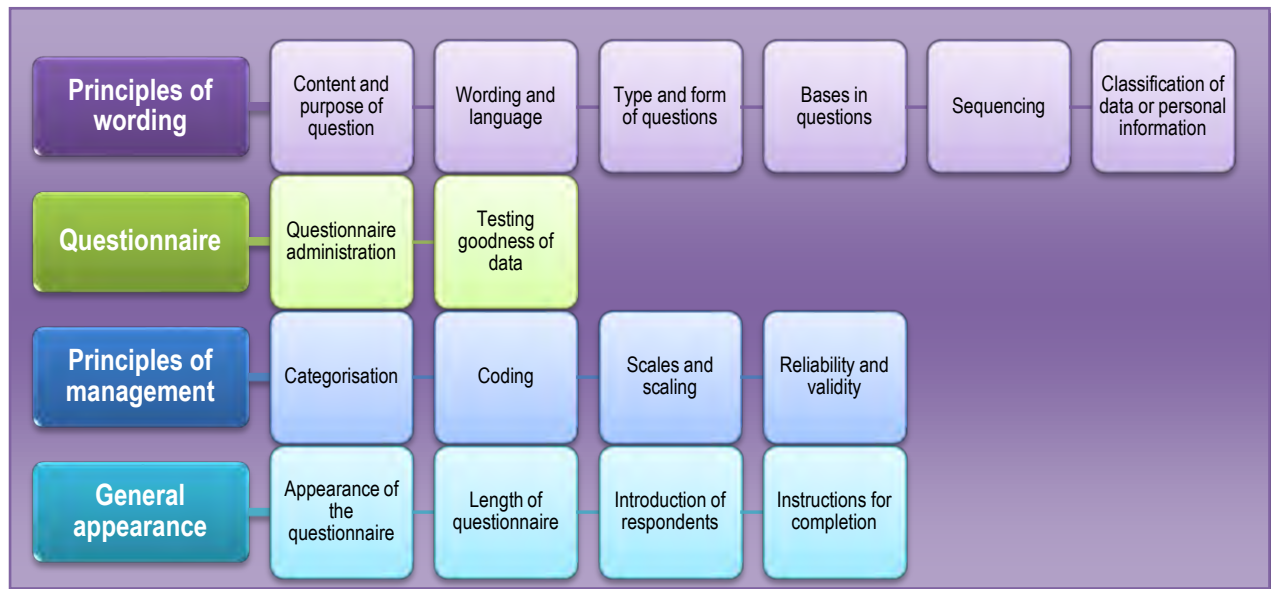


Figure 5-5 Principles of questionnaire design

Adapted from Cavana et al. (2000:228)

Following the Principles of Questionnaire design (Figure 5-5) the researcher designed the questionnaire (Appendix F) that consisted of sections A, B and C. The process followed is indicated below:

Section A consisted of the demographic information of the respondents. Items such as age, gender, number of dependents, qualifications were included. This section of the questionnaire consisted of 15 questions, which were classified according to nominal scales.

Table 5-1 Section A: Demographic factors in questionnaire

Section A: Demographic factors	
1	Age
2	Gender
3	Marital status
4	Number of children
5	Age of children
6	Family location
7	Nationality
8	Period of time in SA
9	Employment history in SAHEI
10	Residential status
11	Employment contract
12	Length of academic career
13	Qualification
14	Current college
15	Current designation

Section B consisted of questions based on the literature review. This section was divided into the Pre-Departure phase of Expatriate Experience (20 questions) and the Actual Expatriation Experience (25 questions). In the first part of Section B, the Pre-Departure phase consisted of 20 questions regarding Motivation to Expatriate, where respondents were asked to rate the level of influence each factor had on their decision to expatriate. These were rated using an ordinal scale, from No Influence (1) to Highly Significant Influence (5).

Table 5-2 Factors in the Motivation to Expatriate scale

Motivation to expatriate	
	Questions
Adventure/travel	13/14
Life change	15/16/17
Financial	18/19
Career	20/21/22
Family	23/24/25/26/27/28
Personal transformation	29/30/31/32

The next part of the questionnaire dealt with the expatriation experience of the expatriate academics and the questions examined the pre-departure phase of the experience as well as the actual international career experience:

The Pre-Departure Phase consisted of 4 questions regarding the perception of the pre-departure phase experience. Respondents were asked to indicate their level of agreement or disagreement with each statement. This section consisted of questions 34-37. These were rated once again using an ordinal scale, from Agree Strongly (7) to Disagree Strongly (1).

The actual expatriation experience sub-scale consisted of 21 questions. Respondents were asked to use an ordinal rating scale, with responses ranging from Agree Strongly (7) to Disagree Strongly (1).

Table 5-3 Factors in the Expatriation Experience scale

Expatriation Experience	
	Questions
Pre-Departure	34/35/36/37
Fulfilment of Expectations	38/39/40/56/57
Family and Friends Support	41/42/43/44
Work Support (School/University)	45/49/50/51/52/53/54/55/58
Community Support	46/47/48

Different response formats were included in the design of the questionnaire so as to prevent a response set from forming when being completed by each individual respondent.

5.6.3.1 Pilot study

Saunders et al. (2003:98) state that before using one's questionnaire to gather data, the instrument should be pilot tested. The motivation behind this is to establish the clarity of the instructions and questions in the questionnaire, remove any problems in terms of the measurement of the variables investigated and allow the researcher to evaluate the reliability and validity of the instrument created.

The pilot study was conducted on a small group of five expatriate academics at the Westville Campus of the University using the same protocols and procedures as would apply in the actual field work. These academics met the criteria of the population in that they were foreign born and held academic positions that involved teaching and research activities but they were employed at UKZN for less than one year. The purpose was to investigate the practicality of the proposed procedure and to uncover possible failings in the measurement procedures or interpretation of questions and to make the necessary changes before the actual study. Also the questionnaire needed to appear professional and instructions needed to be user-friendly and unambiguous. This process went smoothly and suggestions made here were implemented in order to improve the instrument. Initial analysis of the data collected from the pilot test data were done to ensure that the data would address the research objectives for this phase of the study (Jankowicz, 2005; Cooper and Schindler, 2006; Welman, Kruger and Mitchell, 2007) (See Figure 5.3). The results of the pilot test are shown in Chapter 6.

5.6.3.2 Review of assessment instrument by experts in the field

As part of the design process, the draft questionnaire was circulated to six experts in the field of research methodology in the college of Law and Management Studies at UKZN and to leading authorities in the field of expatriate academics as well as a leading authority on foreign academic experiences. Their recommendations for changes to the questionnaire are presented in Chapter 6.

5.6.3.3 Number of scale points on Likert scale items

When designing the questionnaire, different response formats were deliberately used in order to avoid a response set. In modern psychometric methodology, Likert scales and other attitudinal and opinion instruments contain either five or seven response categories. Symonds (1924, cited in Colman, Norris and Preston, 1997:355) was the first to “suggest that reliability is maximised with seven set response categories and other early investigations tended to agree”.

Earlier studies done by Lissitz and Green (1975) and Matell and Jacoby (1972) show that the number of scale points used beyond three have a greater usage of all points contained in these formats. According to Matell and Jacoby (1975:506), unbiased responses tend to be used more often in three-point scales and less often in five-point or seven-point scales. Research indicated that there was no specific reason to favour one over another. The adoption of scales (5/7/10 points) depended mainly on the conditions concerning the processing of the questionnaire. One of these is the actual time taken to fill out the questionnaire for, as the time taken to fill out the questionnaire increases, the higher the likelihood of boredom and fatigue setting in, with respondents no longer taking the time to answer truthfully. In some cases the questionnaire was answered using the telephone; therefore it proved easier to read out the descriptors with a five-point scale as the clarification was straightforward, while the clarification did take longer with a seven-point scale (Dawes, 2007).

Authors such as Sauro (2010), Preston and Coleman (2000) and Coleman et al. (1997) have acknowledged that their results suggest that different scales may be best suited to different purposes:

“Circumstances may, for example, involve respondents being able to use a rating scale under conditions of time pressure; in such cases it may be important in order to

prevent the respondents from becoming frustrated and demotivated to use five-point or even three-point scales, as results show that these are more likely to be perceived by the respondents as quick and easy to use. On the other hand, where considerations of face validity are regarded as critical, it may be important for the respondents to perceive the scales as allowing them to express their attitudes or perceptions adequately, and in such cases 10-point scales may be most appropriate”.

Preston and Coleman (2000:13) suggest that “[b]efore deciding on the optimal number of response categories for a rating scale, researchers and practitioners may ... need to perform a trade-off, in the light of the prevailing circumstances, between reliability, validity, discriminating power, and respondent preferences”.

For the purposes of this study, the self-designed questionnaire was made up of three distinct sections, namely, the demographic section, the Pre-departure phase section and the Actual experience section. The demographic section of the questionnaire consisted of itemised response scales to indicate responses to questions such as gender and age. The Pre-departure section dealt with the decision to expatriate. This section used a five-point Likert scale, in order to elicit responses from respondents. The reason for this is that respondents were given pre-categorised responses and thus would need less variety in terms of choosing their responses as to why they actually decided to expatriate. In the next section, questions dealt with the respondent’s experience of the Pre-departure phase as well as their Actual expatriation experience. Here a seven-point Likert scale was used as questions were not pre-categorised. The reason behind this was to enable the respondents to have a wider variety of choices in terms of how they felt about their experiences. Also, these items were not pre-categorised so that a situation of response set could be avoided.

5.6.3.4 *“Protean and Boundaryless” Career Attitude Scale (Briscoe et al. 2006)*

Section C consisted of a standardised questionnaire adapted from the PBCA (Briscoe et al, 2006) with 27 items for the purposes of measuring the career attitudes of expatriate academics in the study.

Table 5-4 Factors in the “Protean and Boundaryless” Career Attitude scale

“Protean and Boundaryless” Career Attitude	
	Questions
Self-Directed Career Mindset	1-8
Values-Driven Mindset	9-14
Boundaryless Mindset	15-22
Organisational Mobility Preference	23-27 (reverse scoring)

This assessment instrument was selected as it quantitatively measures the career attitude of academic expatriates, these findings relate to research objective 7 of the study. The PBCA (Briscoe et al, 2006) had only been used in a corporate environment and this study is the first time it is has been used to assess the career attitudes of academic expatriates. Therefore it has been adapted for use in a university setting. Thus the use of this instrument in an academic setting served to further validate the instrument across different organisational settings thereby contributing to the existing body of knowledge of career attitudes using the PBCA (Briscoe et al, 2006).

Brisoe et al. (2006:4) developed this scale to render an empirical remedy to a situation where no empirical examination of career models existed by constructing and developing four new scales to measure “Protean and Boundaryless” career attitudes. The protean career attitudes scales were measured by the Self-directed career management (SDCM) and Values-driven (VD) tendencies. The Boundaryless career attitudes were measured the Boundaryless mindset (BM) and Organisational (OM) inclination. SDCM consisted of eight items, VD of six items, OM of four (reverse scored) and BM of eight items (Briscoe et al, 2006:30).

(Briscoe et al, 2006:30) have viewed the “Protean and Boundaryless career attitudes” as autonomous yet connected concepts. Briscoe and Hall (2006:4) combined the two concepts to explore the depth of the Protean and Boundaryless career using 16 possible permutations that could be helpful in determining the Protean and Boundaryless career in the South African context. A combination of the 16 career permutations show either high or low scores in terms of Value-driven and Self-directed aspects (representing the protean career profile) as well as the psychological and physical mobility (representing the boundaryless career profile) (Briscoe et al. (2006:16). (Briscoe and Hall, 2006:17) conducted a series of three experiments whose purpose was to create empirical measures that researchers could use to test hypotheses about these two career models.

Exploratory factor analysis was done with the principle components (PCA) and direct obliment rotation on the protean scales to filter the items of the questionnaire, thereafter the

reliability coefficients obtained at the different studies for the SDCM were 0.75 and 0.81, and for the VD, 0.69 and 0.7 (Bucher, 2007: 176). The filtering of items on the BM scale, resulted in an alpha coefficient of 0.87 and 0.89 for the two different studies and the OM scale, 0.75 and 0.74 (Bucher, 2007: 176).

The second study applied a confirmatory factor analysis. This resulted in the items loading as anticipated on to expected factors and the paths between the dormant factors and the items were at $p < 0.01$ demonstrating that all subscale factors showed significant relationships (Briscoe et al., 2006:41). However it was found that some items revealed cross loadings with other factors sustaining the notion of relatedness, the VD and SDCM scales were significantly correlated ($r = 0.664$, $p < 0.01$), these also correlated significantly with BM. However, no significant correlation existed between SDCM and VD with OM, the BM and OM were negatively correlated ($r = 0.117$, $p < 0.05$) (Briscoe et al., 2006:39).

In order to further validate the use of the PBCA scales in the South African context, a study undertaken by Bucher (2007:12) who used the instrument as part of selection of assessments to create a feasible empirical career adjustment model in order to tackle the dynamic world of work in a South African context. Bucher (2007) tested the PBCA for reliability and validity and he found acceptable results in terms of Cronbach's alpha and Exploratory Factor Analysis (EFA), the results show that the overall PBCA scale showed less reliable results than the values driven scale (VD) at $\alpha = 0.65$. The SDCM scale produced more reliable results at $\alpha = 0.74$. The BM and OM scales rendered the most reliable results at $\alpha = 0.86$ and $\alpha = 0.87$ respectively (Bucher, 2007: 234).

The results for the reliability for the PBCA scale, which was developed and validated by Briscoe et al. (2006), in the current study, are shown in Table 5.5 below.

Table 5-5 Reliability statistics for the "Protean and Boundaryless" Career Attitude scale

Scales	Cronbach's alpha	No of items
Overall	.766	27
Self-Directed Career Management	.615	8
Values Driven Scale	.770	6
Boundaryless Mindset	.729	8
Organisational Mobility Preference	.726	5

Source: Briscoe and Hall, 2006

As established above, Cronbach's coefficient alpha needs to be 0.60 or higher in order to have an acceptable Inter-item Consistency. Table 5.5 shows that the alpha coefficient ranges from 0.615 to 0.770. The results of this study confirm acceptable reliability and are in line

with studies conducted by Briscoe et al. (2006:30). The EFA results for the PBCA scale (Briscoe et al, 2006) in the current study are shown in Tables 5.6 and 5.7 below.

Table 5-6 KMO and Bartlett's Test for the "Protean and Boundaryless" Career Attitude scale

Kaiser-Meyer-Olkin Measure of Sampling Adequacy		.679
Bartlett's Test of Sphericity	Approx. Chi-Square	1023.835
	df	351
	Sig.	.000

Source: Briscoe and Hall, 2006

As stated above, the KMO Measure of Sampling Adequacy (MSA) must be 0.60 or higher in order to be significant. Table 5.6 shows the MSA to be 0.679 and Bartlett's test significant, indicating that the data set complies with the requirements of sampling adequacy and sphericity for EFA to be performed. The Principle Component Analysis (PCA) extracted four components (Factors) and a Varimax Rotation was conducted to make the component (Factors) interpretable. The results for the PBCA scale (Briscoe et al, 2006) are shown in Table 5.7 below.

Table 5-7 Rotated Component Matrix for the "Protean and Boundaryless" Career Attitude scale

	Component			
	1	2	3	4
C2		.644		
C3		.728		
C4		.594		
C5		.734		
C6		.700		
C7		.741		
C9				.468
C10				.371
C11				.721
C12				.783
C13				.723
C14				.556
C15				.382
C17	.783			
C18	.780			
C19	.732			
C20	.642			
C21	.733			
C22	.624			
C23			.398	
C24			.666	
C25			.541	
C26			.678	
C27			.836	
Extraction Method: Principal Component Analysis.				
Rotation Method: Varimax with Kaiser Normalization.				
a. Rotation converged in 5 iterations.				

Source: Briscoe and Hall, 2006

Component 1 (C17, 18, 19, 20, 21, 22) is labelled as Boundaryless Mindset (BM); it consists of statements dealing with enjoying tasks that allow one to work outside the school, seeking opportunities to work outside the university and being energized by new experiences and situations but still remaining employed at the university.

Component 2 (C2, 3, 4, 5, 6, 7, 10) is labelled Self-directed Career Management scale (SDCM); it consists of statements dealing with being accountable for one's own career, such as being responsible for one's own success or failure in the career, having an independent self-directed career, having the freedom to choose a career path, and being dependent on oneself to move one's career forward.

Component 3 (C23, 24, 25, 26, 27) is labelled Organisational Mobility Preference scale (OM); it consists of statements dealing with one's preferences for mobility, such as whether one enjoys the predictability of working for the same university, whether or not one would feel lost if not working for the current university, whether one feels comfortable working in a familiar environment, whether one would stay at the current university if it offered life time employment, and whether one would in an ideal career work at only one university.

Component 4 (C9, 10, 11, 12, 13, 14, 15) is labelled Values Driven scale (VD); it consists of statements dealing with how one's personal values dictate career choices, such as how one's personal priorities dictate a career path, how one feels about one's successes, the importance of personal values and beliefs when making choices in careers and the need to seek out new projects that allow the learning of something new.

5.6.4 Data analysis

There are four rudimentary scales, namely, nominal, ordinal, interval and ratio (see Table 5.5). Nominal scales are analysed using frequency distribution and are the most elementary (Hair, Wolvinbarger, Ortinua and Bush, 2008:154). May (2006) indicated that the main purpose of a nominal scale is to profile respondents. According to Welman et al. (2007:139), ordinal scales are used to represent numbers to rank items. Interval scales display characteristics of both nominal and ordinal scales but is different as they offer additional information. Ratio scales are the most powerful type of scale, as only in ratio scales a fixed and absolute zero point exists. (For possible statistical analysis and tests relating to the various scales, see Table 5.8)

Table 5-8 Types of measurement scales

Scale	Basic empirical operations	Typical use	Typical statistics	
			Descriptive	Inferential
Nominal	Determination of equality	Classification: Male-Female Gender	Percentages Mode	Chi-square Binomial test
Ordinal	Determination of greater or less	Ranking: Preference data Attitude measures Psychological measures	Median	Mann-Whitney ANOVA Rank-order correlation
Interval	Determination of equality of intervals	Index numbers Attitude measures Level of knowledge	Mean Range Standard deviation	Product moment correlation T-test Factor analysis ANOVA
Ratio	Determination of equality of ratios	Sales Units produced Number of customers		Coefficient of variation

Source: Tull and Hawkins, cited in May (2004:132)

In terms of this study, a combination of scales was used in order to seek the required information for analysis purposes. Both nominal and ordinal scales were used for the questionnaire in Phase 2. In Phase 3, a qualitative study, using personal interviews was adopted to furnish the data required to investigate research objectives 10 and 11.

Statistical techniques used are divided into descriptive and inferential categories. If the scores of the entire population are available, descriptive statistics would be appropriate. However, if the population numbers are very large, samples are the ideal method to make deductions about the related population properties. In such cases, inferential statistics may apply (Welman & Kruger, 2004).

5.6.4.1 Descriptive statistics

“Descriptive statistics refer to the description and/or summarisation of the data obtained for a group of individual units of analysis” (Welman & Kruger, 2004:208). Descriptive statistics comprise of the procedures for categorising, condensing and defining quantitative information. The most common descriptive statistics are namely, frequency distributions, measures of central tendency and measures of variability (McCall,1994:8) all of which have been used to explore aims 1 and 2 of this study.

5.6.4.1.1 Frequencies

“Frequencies refer to the number of times various subcategories of a certain phenomenon occur from which the percentage and the cumulative percentage of their occurrence can be easily calculated” (Sekaran, 2003:369). Impressions about a variable could be established by

studying the frequency distribution on a graph depicted through percentage breakdowns (percentiles) of the various categories and histograms (McCall and Hollenbeck, 2002:7). The use of Histograms and bar diagrams in which columns represent frequencies of the various ranges of scores or values of a quantity help to provide an overview of the the variables in its entirety (Welman et al, 2007:208). A visual representation of the results of the data analysis is viewed by Welman et al. (2007) as more appealing to the reader than just using tables. The current study had adopted the use of frequencies throughout all three phases of the research, in order to provide a holistic view of the different units of analysis.

5.6.4.1.2 Measures of central tendency

According to Thomas and Hardens (2004:207), “measures of central tendency indicate the center of a frequency distribution, with the three most commonly used being the mean, median and mode”. The use of each of these measures would depend on the type of results required for the study.

Thomas (2004:208) has defined a mean as the overall total of the values of every case recorded divided by the number of cases. However, the mean can be misleading, especially when unusually high or low values are reflected in the distribution. Harris (1995:96) states that when mean scores are extreme, it becomes unrealistic as the mean takes into consideration every score in the distribution. In phase 2, the mean scores were used to further investigate the units of analysis.

5.6.4.1.3 Measures of dispersion/variability

Measures of dispersion illustrate the degree to which the values of a distribution are spread out around the mean and are commonly called measures of variability, these include range, variance, and standard deviation (Thomas, 2004:208). He further postulates that variance is one of the most important concepts in quantitative research analysis.

Research involves finding the reasons behind the variance in dependent variables, and in order to engage in variable analysis, variation is critical and is conceptualised in a statistic called standard deviation (sd), this measure calculates the average differential value from the mean value for the distribution and the variation that exists and reviews the degree to which a set of measures are combined or distributed around the mean value (Sekaran and Bougie, 2010:188).

Sekaran and Bougie (2010:189) state “the range of a set of observations is the difference between the largest observation and the smallest observation and is regarded as a simple measure of dispersion”. Standard deviations (sd) were used in Phase 2 of the study, to identify the range of responses in the different sections of the questionnaire.

5.6.4.2 Inferential statistics

The main function of inferential statistics is to establish relationships among variables and draw conclusions thereafter. This statistical procedure could also be used to test statistical hypotheses. Currall and Towler (2003:516) state that descriptive statistics are processes that minimise information about a set of measurements while, inferential statistics are made up of techniques that make statements based on limited information through a theory of probability.

According to Thomas (2004:212), it is not likely that a sample will duplicate a population exactly, thus the need to test if the variation is statistically significant or not. Testing for statistical significance is one way to estimate the probability that results from a sample are because of accidental variations (sampling errors) rather than indicating actual differences.

Inferential statistical techniques that were used to test the results of the questionnaire in Phase 2 of the study include the T-test, analysis of variance (ANOVA) and Pearson’s product moment correlation coefficient.

5.6.4.2.1 T-test

The T-test assesses if two groups have comparable or different mean scores. Descriptive research compares the mean of one group with that of another group and establishes whether an observed difference in means of two groups is big enough to be accredited to a change in some variable or whether the change is accredited to chance (Welman and Kruger, 2004:213). This technique was used to examine the relationships between variables in Phase 2 of the study.

5.6.4.2.2 The analysis of variance (ANOVA)

The analysis of variance involves quantitative analytical procedures and relates to the analysis of group differences rather than individual differences (Sekaran and Bougie, 2010:187). The purpose of this analysis is to establish whether the differences between the

control groups on the dependent variable is large enough to indicate that they are unlikely to have occurred by chance.

These tests were used to determine whether the different sub-groups of the demographic variables such as age, gender, marital status, differ on the variables of interest in Phase 2 of the study.

5.6.4.2.3 Pearson product moment correlation coefficient

This is also known as the *linear correlation coefficient*, this measures the strength and the direction of a linear relationship between two variables. The value of r is such that $-1 \leq r \leq +1$. The + and – signs are used for positive and negative linear correlations, respectively (Mathsbits, 2014). This technique was used to determine the correlations between the variables in Phase 2 of the study.

- ❖ “Positive correlation: If x and y have a strong positive linear correlation, r is close to +1. An r value of exactly +1 indicates a perfect positive fit. Positive values indicate a relationship between x and y variables such that as values for x increases, values for y also increase.
- ❖ Negative correlation: If x and y have a strong negative linear correlation, r is close to -1. An r value of exactly -1 indicates a perfect negative fit. Negative values indicate a relationship between x and y such that as values for x increase, values for y decrease.
- ❖ No correlation: If there is no linear correlation or a weak linear correlation, r is close to 0. A value near zero means that there is a random, nonlinear relationship between the two variables. Note that r is a dimensionless quantity, that is, it does not depend on the units employed.
- ❖ A perfect correlation of ± 1 occurs only when the data points all lie exactly on a straight line. If $r = +1$, the slope of this line is positive. If $r = -1$, the slope of this line is negative.
- ❖ A correlation greater than 0.8 is generally described as strong, whereas a correlation less than 0.5 is generally described as weak. These values can vary based upon the “type” of data being examined. A study utilising scientific data may require a stronger correlation than a study using social science data”.

5.6.5 Reliability and validity of the questionnaire

Reliability means consistency and thus, should the same situation recur under similar or identical situations, the test scores remain accurate, consistent or stable. Validity is has been defined as the extent to which the empirical measure adequately represents the accurate connotation of the concept (Hook, Mkhize, Kigawe and Collins, 2004:530).

5.6.5.1 Reliability in quantitative research

Nunnally (1967, cited in Cortina, 1993:98) defines “reliability as the extent to which measurements are repeatable and [observes] that any random influence which tends to make measurements different from occasion to occasion is the source of measurement error”. Cooper and Schindler (2006:716) confirm this by defining reliability as a trait of measurement focusing on accuracy, precision and consistency, critical but not sufficient proviso for validity. If the measure is not reliable, then it is not valid. Cavana et al. (2000:210) agrees and observes that the reliability of a construct illustrates the consistency whereby the instrument measures the construct that allows the assessment the so-called ‘goodness of a measure’.

The measuring instrument tested for reliability in Phase 2 of the study is the questionnaire. In other words, if the questionnaire is used at different times or administered to different subjects from the same population, the findings remain the same. The researcher applied the statistical technique, Cronbach’s coefficient alpha, to ascertain the inter-item reliability of the items on the self-designed questionnaire designed for this study. This is a tool used to indicate how well the items in a set of questions are positively correlated to each other (Cortina, 1993; Pietersen and Maree, 2007).

The researcher was interested in identifying the questions (items) in the questionnaire that were responsible for lowering the reliability of the instrument. Cronbach’s alpha is a tool used to give some measure to the level of reliability. George and Mallery (2003:1) provide a guide on how to best interpret this measure:

“Cronbach’s alpha reliability coefficient normally ranges between 0 and 1. However, there is actually no lower limit to the coefficient. The closer Cronbach’s alpha coefficient is to 1.0 the greater the internal consistency of the items in the scale. Based upon the formula $\alpha = rk / [1 + (k - 1) r]$ where k is the number of items considered and r is the mean of the inter-item correlations, the

size of alpha is determined by both the number of items in the scale and the mean inter-item correlations. George and Mallery (2003:1) provide the following rules of thumb: $\alpha > 0.9$ – Excellent, $\alpha > 0.8$ – Good, $\alpha > 0.7$ – Acceptable, $\alpha > 0.6$ – Questionable, $\alpha > 0.5$ – Poor, and $\alpha < 0.5$ – Unacceptable”.

Cooper and Schindler (2003:216) explain that a Cronbach’s alpha value of above 0.5 is regarded as an indication of reliability. More recently, Hair, Black, Babin and Anderson (2010:687) have asserted that as a practical guideline, reliability is that .7 or higher reports good reliability. Reliability between .6 and .7 may be acceptable on condition that other measures of the construct’s validity are good. High construct reliability illustrates that internal consistency is present, this means that all measures represent the same construct constantly.

Cronbach’s coefficient alpha was used to establish inter-item consistency reliability and factor analysis to establish factorial validity for the questionnaire in Phase 2. A report of the findings of reliability using the Cronbach’s alpha is presented in Chapter 7.

5.6.5.2 *Validity in quantitative research*

According to Saunders, Lewis and Thornhill (2009:101), “validity is concerned with whether the findings are really about what they appear to be about”. Validity is a concept of measurement that decides if a test measures what the researcher intended to measure and if differences found in an instrument reveal true differences between the respondents (Remenyi, Williams, Money and Swartz, 2005; Cooper and Schindler, 2006:720). Cavana et al. (2000:212) notes that validity tests can be classified under four broad groupings:

- “Face validity: this is a basic and nominal index of validity. It shows that the items included in the questionnaire are clear and understandable to the respondents.
- Content validity: this ensures that the measures include a sufficient and representative set of items that draw on the concept.
- Criterion-related validity: this is determined when a measure separates people in terms of a criterion the measure is expected to predict.
- Construct validity: this confirms how well the results derived from the use of the measure fit around the theories around which the test is derived”.

Credibility is a critical factor in this study as it is exploratory in design; therefore both face validity and content validity were of concern. Face validity was ensured through the

administering of a pilot test to academic expatriates from UKZN who did not meet the parameters of the study because they had not been employed for more than one year by UKZN. This was also done by sending out the questionnaire to a panel of experts in research methodology in the College of Law and Management studies and the area of study to make sure that the design and the interpretation of the questions were not confusing or misleading. Content validity was ensured by an extensive review of the literature on the subject as well as by sending the questionnaire out to experts in this area of study.

As the questionnaire used was self-designed, it was important to the researcher to establish the construct validity of the instrument. This was done using factor analysis. Exploratory factor analysis (EFA) is a method of deciding on the number and nature of unobserved latent variables that can be used to describe the shared variability in a set of observed indicators and, according to Preacher, Zhang, Kim and Mels (2013), is one of the most valuable methods in business research today. Factor analysis can be used to study the fundamental patterns of relationships between concepts and to analyse if that information can be reduced into a smaller set of components (Hair et al, 2010:93). Factor analysis in general, allows researchers to analyse the structure of relationships (correlations) amongst a large group of variables by describing sets of variables that are highly interconnected (factors) (Hair et al, 2010:94).

In order to ensure construct validity, a normality test was run to see if the data follows a normal distribution or not. The most fundamental assumption in multivariate analysis is normality. This refers to “the shape of the data distribution for the individual metric variable and its relationship to the normal distribution, the benchmark for statistical methods” (Hair et al., 2010:95).

The test used was the ‘Kaiser-Meyer-Olkin (KMO) Measure of Sampling Adequacy’ and ‘Bartlett’s test of sphericity’ for whether the sample is adequate for factor analysis. As a general rule, the KMO value should be .60 or higher to continue with factor analysis (Hair et al., 2010:73). ‘Principle component analysis’ and ‘Verimax rotation’ were also used to safeguard construct validity. The parametric tests used to determine validity of the self-designed questionnaire were the KMO and Bartlett’s test, principle component analysis and Verimax rotation. The results of these tests are presented in Chapter 7. A brief explanation of these parametric tests is presented next.

- *Principal component analysis*: This test considers the total variance and derives factors that contain small proportions of unique variance and, in some instances, error variance (Hair et al., 2010:107). This test is used when the objective is to summarise the original information (variance) in a minimum number of factors for prediction purposes.
- *KMO and Bartlett's test of sphericity*: This is a statistical test to determine the presence of correlations among variables. According to Hair et al. (2010:107), it provides the statistical indication that the correlation matrix has significant correlations among at least some of the variables.
- *MSA (Measure of Sampling Adequacy)*: This is a test to quantify the degree of inter-correlations among the variables and the appropriateness of factor analysis. This index ranges from 0 to 1. The measure can be interpreted using the following guidelines (Hair et al., 2010:107):
 - .80 or above (meritorious)
 - .70 or above (middling)
 - .60 or above (mediocre)
 - .50 and above (miserable)
 - below .50 (unacceptable)

A researcher can only proceed with factor analysis if the MSA is above .50”.

- *VARIMAX rotation*: Abdi (2003:3) claims that the VARIMAX is the most commonly used orthogonal factor rotation method concerned with the simplification of columns in a factor matrix. With the VARIMAX approach, Hair et al. (2010:115) state that the analysis thereof is simplest when the variable-factor correlations are “(1) close to either +1 or -1, as are some loadings near 0 in each column of the matrix, thus clearly indicating a positive or negative association between the variable and the factor, or (2) close to 0 indicating a clear lack of association”.

5.7 Phase 3: Qualitative study

This phase of the research covers aim 3 of the study, as well as research objectives 10 and 11. See Figure 5.6.

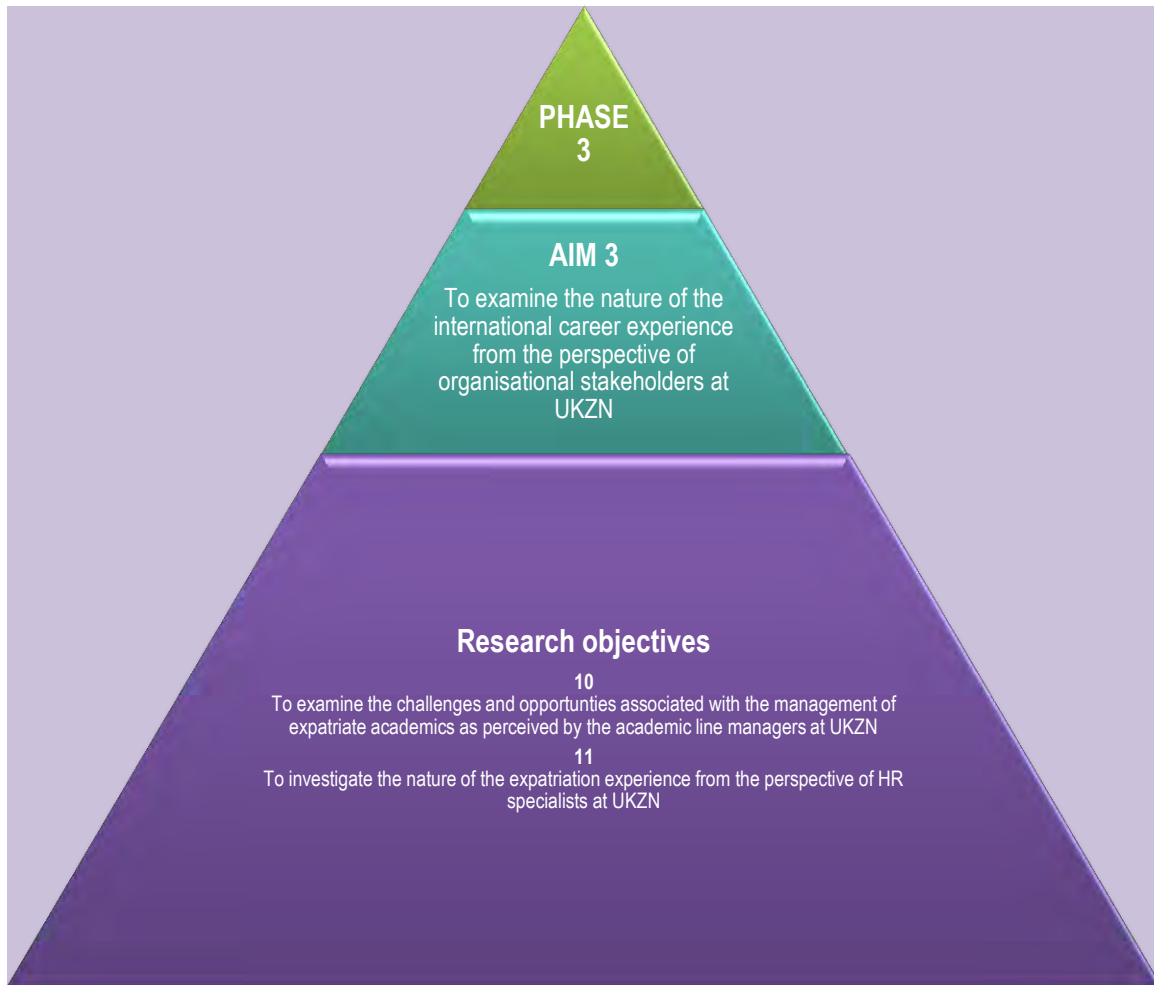


Figure 5-6 Research design of Phase 3 of the study

5.7.1 *Sample and sampling technique*

The sampling technique used in the qualitative phase (Phase 3), that is Aim 3, covering research objectives 10 and 11 of this study, was non-probability sampling, as once again the purpose was to obtain information available to two selected groups of individuals, namely, the line managers of expatriate academics as well as HR specialists. These line managers were selected because they had three or more expatriate academics in their schools. HR specialists were selected on the basis of their involvement in the recruitment, selection and retention of expatriate academics. Purposive sampling, using a judgement sample, was used in order to provide a selection of subjects who would best be able to avail the information required (Sekaran and Bougie, 2010: 277).

From the eighteen schools that matched the sample parameters, that is, those having three or more expatriate academics, 14 interviews were successfully completed. The researcher felt

that, at this point, theoretical saturation had been reached and that additional interviews would not provide new information that challenged or added to the emerging interpretive account; thus no more interviews were conducted.

In the qualitative study, the underpinning rationale was for not the quantity of data but instead the 'richness of the data', not the numbers but the in-depth descriptions (Carey 1995:492). In describing the sample for this research, it must be stated that sampling was driven by the desire to learn in detail and in depth about the experience of individuals. Hence, the conclusion about sample numbers was established on evidence of data saturation ('redundancy') that occurred when no new information of significance obtained for further thematic development and positing (Higginbotham, Albrecht and Conner, 2001:236). Thus, the researcher asserted with confidence that a point of saturation had been reached, based on repeatedly comparing data to additional data (Cutcliffe and McKenna, 2002:614).

Cooper and Schindler (2006:716) define "qualitative research as non-quantitative data collection used to increase understanding of a topic". Qualitative data involves the analysis of data, such as words (from interviews), pictures (from videos) objects (example artefacts). Qualitative researchers try to make sense of feelings, experiences, social situations or phenomenon in their natural setting (Terreblanche, et al. 2006). Authors like Jankowicz (2005) and Cresswell (2009) agree that in qualitative research the questions a researcher wished to investigate should be clear and the researcher be required to engage with the research setting and the participants with empathy and transparency.

5.7.2 Data collection method

This phase of the study consisted of various steps, namely, preparing for data collection, collecting the actual data, analysing the collected data and writing up the results, each step being discussed below.

5.7.2.1 Preparing for data collection

Initial email contact was made with HR managers as well as line management at UKZN with the study and to set up a time to interview potential respondents. Respondents granted permission to conduct the interviews and after a copy of the interview guide was provided, interviews were conducted either face-to-face or telephonically.

Table 5-9 List of interviews conducted with Human Resource specialists

Respondent	Gender	Designation	College
1	Female	Senior Manager	Agriculture, Science and Engineering
2	Female	Senior Manager	Health Sciences
3	Female	Senior Manager	Health Sciences
4	Female	Senior HR Consultant	Law and Management Studies
5	Female	Senior HR Consultant	Law and Management Studies
6	Female	Senior HR Consultant	Benefits and Compensation
7	Female	Senior HR Consultant	Benefits and Compensation
8	Female	Senior HR Consultant	Talent Sourcing
9	Female	Senior HR Consultant	Recruitment and Selection

Table 5.9 illustrates those HR specialists selected by the researcher who would be in the best position to provide the most information-rich data regarding the attraction and retention of expatriate academics at the university. Semi-structured interviews were conducted with staff from the HR division of the university; nine interviews were held with those HR specialists who would have the most experience with expatriate academics either in recruitment and selection, talent management or compensation and benefits.

Table 5-10 List of interviews conducted with line management at the university

Respondent	Gender	Designation	School	College
1	Male	Dean/Head of School	Mathematics, Statistics and Computer Sciences	Agriculture, Science and Engineering
2	Female	Dean/Head of School	Health Sciences	Health Sciences
3	Female	Academic Leader	Mathematics, Statistics and Computer Science	Agriculture, Science and Engineering
4	Male	Academic Leader	Physics and Chemistry	Agriculture, Science and Engineering
5	Male	Academic Leader	Physics and Chemistry	Agriculture, Science and Engineering
6	Male	Academic Leader	Management, Information Systems and Governance	Law and Management Studies
7	Male	Academic Leader	Agricultural, Earth and Environmental Sciences	Agriculture, Science and Engineering
8	Male	Academic Leader	Life Sciences	Agriculture, Science and Engineering
9	Female	Dean/Academic Leader	Law	Law and Management Studies
10	Male	Academic Leader	Accounting, Economics and Finance	Law and Management Studies
11	Male	Academic Leader	Engineering	Agriculture, Science and Engineering
12	Male	Academic Leader	Engineering	Agriculture, Science and Engineering
13	Male	Academic Leader	Clinical Medicine	Health Sciences
14	Male	Academic Leader	Life Sciences	Agriculture, Science and Engineering

Table 5.10 provides a list of the second group of participants in Phase 3 of the study, that is, academic line management from the different disciplines where expatriate academics are employed at UKZN. Semi-structured interviews were held with the academic line managers, namely, academic leaders and heads of schools with three or more expatriate academics in

their schools and or disciplines, so that the interviews conducted would yield the most information-rich cases.

The main purpose of these interviews was to investigate Aim 3, objectives 10 and 11 of the study, namely, to investigate the nature of the international career experience from the perspective of organisational stakeholders at UKZN.

5.7.2.2 Data collection method: Interviews

Data were collected using personal interviews with participants in order to seek information on issues of interests (Sekaran, 2003). Interviews may be structured, unstructured or semi structured (Saunders et al., 2003; Sekaran, 2003), and carried out face-to-face, telephonically and even online (Sekaran, 2003). Simply put, an interview is a focused discussion between two or more persons (Saunders, et al, 2003:12).

An in-depth interview strategy encompasses in-depth individual interviews by the researcher in an effort to investigate specific standpoints on specific ideas or situations and areas of interest and to document their responses (Boyce and Neale, 2006:13; Monette, Sullivan and De Jong, 2008). Semi-structured interviews were used for the purposes of this study. In a semi-structured interview, the researcher uses a list of questions on particular issues under investigation, called an interview guide (Bryman and Bell, 2007:457). It is critical to realise that with semi-structured interviews, participants have flexibility in how they chose to respond (Bryman, 2004:34).

In-depth interviews formed the principal method of data collection for phase 3 of study and were carried out face-to-face or telephonically, based on the interviewees' availability and convenience. Face-to-face interviews allow immediate rectification of any issues of misunderstanding that may arise during the responses of the participant (Sekaran, 2003:56). Face-to-face interviews allow the researcher to pick up on non-verbal cues such as discomfort/uneasiness, stress or problems that are observed from frowns, nervousness, or other forms of body language (Sekaran, 2003:56). Questions were open-ended; this allowed respondents to answer in the manner that they preferred (Sekaran, 2003). Probing during the interview process was also introduced on several occasions and are used to further investigate the responses of participants in connection to the research problem (Saunders et al., 2003:11). Telephonic interviews were conducted with those participants with whom it was impractical

to conduct an interview on a face-to-face basis because of the distance, the travelling costs and the time required (Saunders et al., 2009).

The qualitative interviewing technique that allowed the interviewer the flexibility to diverge from the interview schedule used and follow up responses with new questions or even change the sequence of the questions was used by the researcher (Bryman and Bell, 2007:457). Figure 5.7 provides the interview schedule for the interviews with UKZN's HR division. The main purpose of these interviews was to investigate the challenges associated with the attraction and retention of expatriate academics; this serves to answer the research question involving the investigation of the challenges associated with the attraction and retention of expatriate academics as perceived by the HR specialists.

INTERVIEW QUESTIONS – HR SPECIALISTS	
1. PRE-DEPARTURE PHASE	
1.	What is the typical process regarding the recruitment and selection of foreign academics?
2.	What attracts expatriates to the institution? Why do you think academic expatriates might apply to this institution?
3.	How are the interviews conducted?
4.	Is there any type of support offered to individuals at this stage?
5.	What kind of provisions, if any, does the institution make for the family in the interview process or after someone has been appointed?
6.	Why do you think expatriate academics choose this institution over others in South Africa?
2. ACTUAL EXPATRIATION EXPERIENCE	
1.	Once the offer of employment has been made, what is the procedure regarding the international recruit?
2.	At this stage, what kind of organisational support programme does the organisation offer?
3.	Once the incumbent arrives, what kind of support does the Human Resources Department offer to the incumbent, his or her family and his or her Head of School?
4.	What are the challenges associated with managing academic expatriate faculty?
5.	What factors, in your opinion, contribute to the success or failure of the expatriate during the expatriation experience?
6.	In your opinion, what value do academic expatriates add to the institution as a whole?
7.	What are your recommendations to ensure the success of the expatriate's experience?
3. POST ASSIGNMENT PHASE	
1.	Do you have any practices or goals to try to retain academic expatriates?

Figure 5-7 Interview schedule for Human Resource specialists at UKZN

Figure 5.7 illustrates the questions asked by the researcher of the managers of expatriate academics. It helps provide the employer's perspective which was useful both as a way of situating the faculty, school, discipline and administration's viewpoint within the larger institution as well as a form of enquiry into the circumstances of the group (expatriate academics) on campus.

INTERVIEW QUESTIONS FOR ACADEMIC LINE MANAGERS

1. What kind of support is given to academic expatriates in your school?
2. In your experience, in your position, which do you see as the most important issues that should be addressed with expatriate academic staff in your department?
3. Do academic expatriates receive any additional training or orientation beyond what is offered to other new faculty during the initial period after arrival?
4. In your experience, what are the major challenges you face in having an academic expatriate in your department?
5. In your opinion, has there been a value-add to your department by having an academic expatriate working here? If so, what?
6. How would you describe the level of collegiality for academic expatriates in the institution and community/country in which your institution is located? Prompt for responses on each category
7. How would you define the success or failure of an academic expatriate?
8. What would be your recommendations for the success of the expatriation experience both for the institution and the academic expatriate?

Figure 5-8 Interview schedule for academic line managers at UKZN

5.7.3 *Data analysis*

The principal mode used to analyse data in the qualitative phase of this study were thematic analysis. Thematic analysis encompasses an exploration of themes that arise in conjunction with the examination and explanation of a research problem (Daly, Kellehear and Gliksman, 1997, cited in Feredy and Muir-Cochrane, 2006:80). Thematic analysis serves as the foundation for qualitative methodology, and maybe construed as a means for the identification, analysis and reporting of ‘patterns’ or themes within data’ (Braun and Clarke, 2006:79). Flexibility is immensely beneficial in thematic analysis as it allows the aggregation of in-depth and complicated information (Braun and Clarke, 2006). This is done by repeatedly reading the data to identify themes recurrent in it (Rice & Ezzy, 1999, cited in Feredy and Muir-Cochrane, 2006:83). Patterns and themes are then identified and deciphered from data, this forms the foundation for further analysis (Feredy and Muir-Cochrane, 2006:89). A theme encapsulates something important concerning the data collected to answer a research question. As flexibility is the cornerstone of this analysis, it is the judgement of the researcher that determines a theme (Braun and Clarke, 2006). The process starts when the researcher starts to be aware of ‘patterns of meaning’ during the data collection phase of the research.

Thomas and Hardens (2007:78) developed a guide to thematic analysis that consists of three stages, namely, “free line-by-line coding of findings of primary studies, the organising of codes into areas to create themes and, lastly, the construction of analytical themes”. Analysis of data comprises of ‘moving back and forth between the entire data set’. Themes were

manually coded in this case study and developed through consistent examination of all interview transcripts many times. Themes were selected according to their significance to the research questions of the study. They are discussed extensively in chapter 6, where the data analysis is presented.

Kelly (2006:285) argues that the aim of thematic analysis is to alter data into responses to research questions posed. Therefore the examination should offer a ‘rich description’, in other words, a comprehensive overview of the characteristics, processes, transactions and contexts that make up the phenomenon, as well as the role the researcher plays in creating this description. Thematic analysis was done to analyse the qualitative data of the current research. Thus, after going through the transcripts several times as well as having conducted a thorough literature review, themes were able to be developed. The method for thematic analysis prescribed by Thomas and Harden (2007) was followed. The emerging themes were chosen according to their significance to the research questions.

5.7.4 Reliability and validity

Reliability is concerned with whether or not alternative researchers would gain similar information. The concern also relates to bias, and there are several types to consider (Saunders et al., 2009:326):

- “Interview bias: This is the way in which interviewers comment; their tone, intonation or non-verbal behaviour may influence the way in which interviewees answer the questions.
- Interviewee bias: This is created by perceptions that the interviewee may have of the interviewer, the purpose of the interview and its desired outcome. This may result in a distorted response from the interviewee, who may want to portray themselves in a ‘socially desirable’ role”.

“Qualitative reliability implies that the approach is consistent across different researchers and different projects” (Gibbs, 2007:36). Every consideration was taken by the interviewer to ensure that the location selected for the interview was safe and made both participant and interviewer feel comfortable and private.

Gibbs (2007:37) also suggested several processes to make sure that the data collected is reliable. These include, making sure the transcriptions are free from errors, ensuring that

there is no distortion in meaning during transcription, proper and effective communication between members of the research team and an examination of codes adopted by different

In Phase 3, the qualitative phase of this study, reliability was achieved by verifying the accuracy of results by means of checking transcripts to make sure there were no errors as well as sending copies of transcripts to respondents to ensure that they were a true reflection of the interview conducted.

Validity is one of the strengths of the qualitative researcher. It is achieved using the following strategies (Cresswell, 2009:191):

- “triangulation of different sources of data
- member checking, that is, verification of the transcripts with the participants
- use of rich, thick description to convey findings
- clarification of any bias that the researcher may bring to the research
- presenting of any negative or discrepant information that contradicts the themes
- spending prolonged time in the field
- peer debriefing to enhance the accuracy of the account
- use of an external auditor to enhance the accuracy of the account”.

Validity in this study was achieved by triangulation of results, the verification of the accuracy of the transcriptions and presenting all information in a transparent manner even if it contradicted the themes of the research.

5.8 Ethical considerations

When analysing and interpreting data, both quantitative and qualitative, issues emerge that call for good ethical decisions. Research ethics according to Wassenaar (2006: 61) “involves more than a focus on the welfare of research participants and extends into areas such as scientific misconduct and plagiarism”.

The consideration of ethical issues was of paramount importance during this research. The philosophical principles that uphold ethical research were at all times respected and upheld during this study. These are:

- *Autonomy and respect for the dignity of persons* (Wassenaar, 2006:67). Ethical clearance had to be granted by the University’s Research Ethics Committee before

any data could be collected. The protocol reference number for this study is HSS/0772/011D. The autonomy of the respondents was protected through the use of an informed consent form which specifies that all responses would be treated in a confidential and anonymous manner, through the use of coded names, participation in the study is on a voluntary basis, and participants can withdraw at any time. (See Appendix F)

- *Nonmaleficence*. This is the principle that states that “researchers do no harm to the research participants and that they consider any potential risks (physical, emotional, and social) that the study may inflict upon them” (Waasenaar, 2006:67). Once again, this was upheld through the use of an informed consent form (See Appendix E and G); confidentiality of all respondents was strictly maintained with access to the questionnaires and the interviews being restricted to the researcher and her supervisor, with no names being used, thus ensuring complete anonymity.
- *Beneficence*. “Beneficence requires the researcher to design a study that would benefit the participants as well as society at large” (Wassenaar, 2006:67). This study fulfills this principle as the findings of the study were used to produce recommendations regarding organisational support for expatriate academics, while addressing the concerns of departments, students and immigration regulations.

The anonymity of respondents was preserved by not including their names when documenting the research findings and any subsequent publications. Individual responses have been presented in the form of trends in order to make the identification of individual respondents impossible.

5.9 Delimitations

The first delimitation was the choice of problem itself that is the international career experiences of expatriate academics that have been examined from an individual and an organisational perspective. The delimitations in this study arise mainly from the past literature. The scope was limited to a few specific constructs, due to the fact that there was a dearth of other studies on expatriate academics, decisions concerning what to measure and what may be of importance had to be taken. Based on the definitions of the different types of international career experiences such as sojourners, migrants and those on an overseas experience, the decision to select those with a period of stay in South Africa from one to ten

years allowed to researcher to target those with the relevant experience with the kind of issues being explored in this study.

Previous studies of the career experiences of expatriate academics have mainly been of a qualitative nature, therefore this study adopted a quantitative design in order to provide substantive empirical evidence. This study has adopted a case study design with a mixed methodology therefore also has design and/or methodology characteristics that limit the interpretation of the results. The results of this study may not be generalisable to academic settings other than where the data were collected. Therefore, if the study was repeated at a different institution the results may vary. This stems largely from the fact that the institution chosen for the study employs the third largest number of expatriate academics in SA.

Respondents in this study were expatriate academics employed at UKZN and therefore the results cannot be transferred to other groups of individuals. The participants in the qualitative study were those line managers with experience with managing expatriate academics in their departments, as only those with three or more such academics in their departments were included in the study, HR specialists were also selected to participate in this study because of their experience with the recruitment, selection and retention of expatriate academics at UKZN. Race was excluded as a demographic in this study as the records from DMI at UKZN and the national database HEMIS do not specify race when identifying expatriate or foreign employees. In fact, foreign employees are merely classified as “other” or “non-SA”, therefore there was no possibility for further categorisation.

5.10 Conclusion

The methodology chapter outlines the theoretical framework that has guided the research design and provides a justification for the use of this methodology, given the aims of the research. The explanation of the research process aims at ensuring the trustworthiness of the research and therefore the claims that it makes in adding to the body of knowledge self-initiated expatriates and expatriate academics, in particular, within the South African context. These findings of the analysis of each of the three phases, encompassing the three aims of the study are presented in the following three chapters, namely chapters 6, 7 and 8. The findings are consolidated in the discussion chapter where the emerging themes and its implications for individuals and organisational stakeholders are discussed in detail. This is followed by a

concluding chapter, where recommendations are made to improve the success of the international career experience as well as a 'best practice' policy is developed to manage the international career experience of expatriate academics at UKZN.

Chapter 6

Phase 1: Secondary Data Collection

6.1 Introduction

In this chapter, the results of Phase 1: Secondary data collection of the current study have been presented. The main themes that have been presented in this chapter are the demographic profile of the expatriate academics, the institutions of choice in SA as well as the major supply regions of expatriate academics to SA; and a comparison of South African academics to expatriate academics in terms of age, gender, qualification and country of origin over the three years 2005/2010/2012. Also the results of the case study of UKZN, in terms of age, gender, qualification, field of study and level of academic post, have been presented here.

In this chapter, the responses obtained for the secondary data collection phase of the study were computed using the software Statistical Software Package for Social Science (SPSS) version 21 for Windows. This chapter presents the results of the findings for the Aim 1 of the study, namely, to investigate the demographic profile of staff at SA higher education institutions using descriptive and inferential statistics on data obtained for academic staff. The following research objectives have been investigated and the results presented here:

1. To investigate the demographic profile (age/gender/qualification/country of origin) of expatriate academics in South African higher education institutions over three years (2005/2010/2012)
2. To categorise the ranking of South African higher education institutions in terms of the number of expatriate academics employed and their countries of origin over three years (2005/2010/2012)
3. To compare and contrast South African academics with expatriate academics in terms of qualifications, age and gender over three years (2005/2010/2012)
4. To compare and contrast South African with expatriate academic staff at UKZN in terms of age, gender, qualification, field of study and level of academic post for 2005/2010/2012

These results have been obtained from the HEMIS system, the data management system for the Department of Higher Education and Training (DOHET) of SA. All results have been verified and audited by the DOHET for authenticity. The data for UKZN has been obtained from the DMI system of UKZN after being verified and audited for authenticity. The data has been obtained for three years, namely, 2005, 2010 and 2012. This is so that the researcher could discover the trends in terms of demographic variables for SA and expatriate academics across an eight-year period. At the time of final submission, the audited results for 2013 were not available from HEMIS; in any event, the research analysed the available data to track the demographic profile of the staff in South African higher education for the current study.

6.2 Demographic profile of expatriate academics in South Africa for 2005/2010/2012

The data on the demographic profile of expatriate academics in SA are presented below in the following order: age, gender, and qualification, then country of origin of expatriate academics, that is, non-SA academics, for 2005/2010/2012.

6.2.1 Age

In 2005, the total number of expatriate academics in SA was 701; the youngest academics were 24 years old and the oldest 65 years old. The average age of respondents was 44.03 years. In 2010, the total number of expatriate academics was 1362; the youngest were once again 24 years old and the oldest now 70 years old. The average age of respondents was 42.9 years old, slightly younger than in 2005. In 2012, the total number of expatriate academics was 3632, the youngest academics were once again 24 years old and the oldest 70 years old.

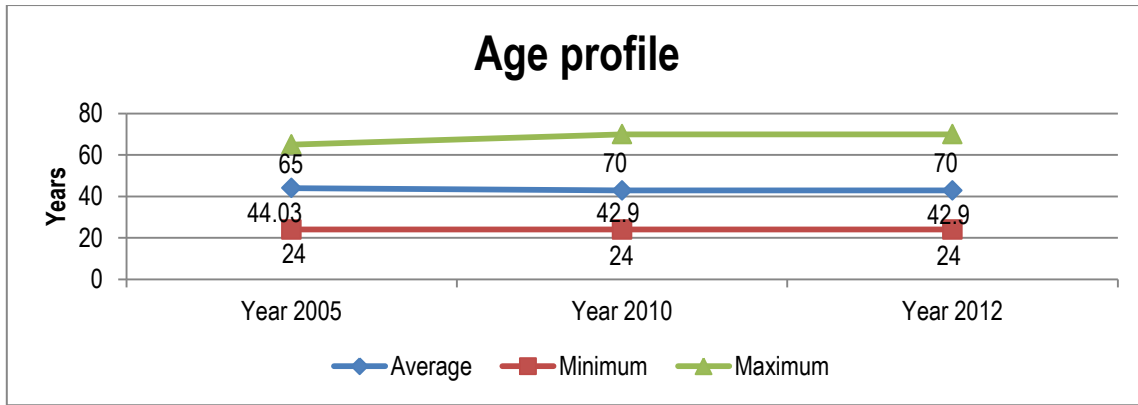


Figure 6-1 Age of expatriate academics for 2005/2010/2012

The mean ages were tested to see whether there was any significant difference across the three years. It was found that significant differences did exist ($\chi^2(2, n=3632) = 10.25, p=.006$). Specifically, the average age for 2005 is significantly higher than that for: 2010 ($Z(n=2063) = -2.88, p=.004$) and also for 2012 ($Z(n=2270) = -2.97, p=.003$). This shows that expatriate academics coming to SA are now doing so at a younger age than previously.

6.2.2 Gender

In 2005, there were more male (75.9%) than female (24.1%) expatriate academics in SA higher education institutions. In 2010, there was a similar trend with more male (76.1%) than female (23.9%) expatriate academics. In 2012, this pattern continued with more male (75.7%) than female (24.3%) expatriate academic staff in SA higher education institutions. However, there seems to be an overall increase in the number of female expatriate academics at SA higher education institutions over the eight year period.

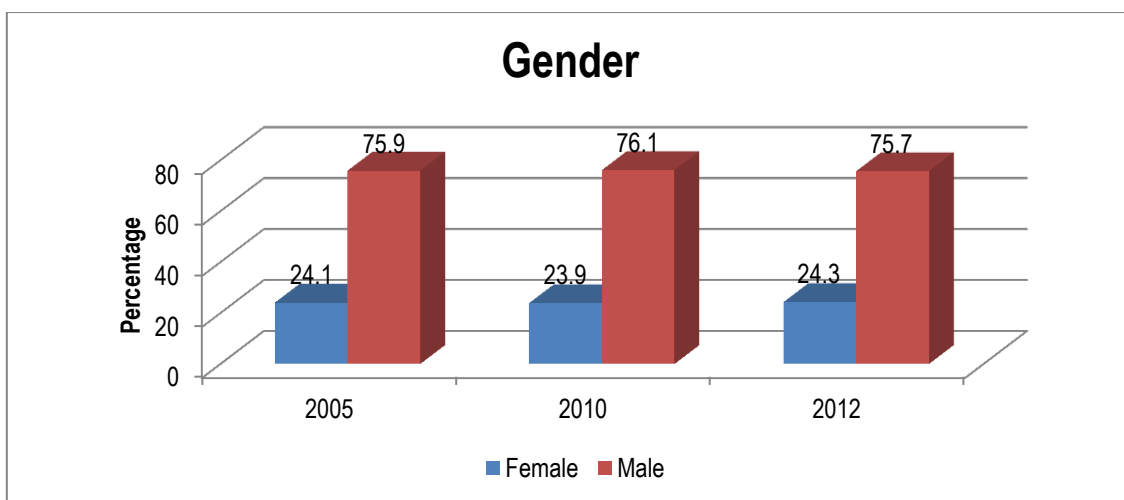


Figure 6-2 Gender of expatriate academics for 2005/2010/2012

These results show that there were no significant differences between the distributions of genders for the different years. The trend remains consistent over the eight year cycle.

6.2.3 Qualifications

The qualifications of expatriate academics fall into the following categories as indicated on Table 6.1 below:

- Undergraduate degree (Bachelors) or diploma
- Post-graduate degree/diploma
- Honours degree
- Masters' degree
- Doctoral degree
- Other types of qualifications (National certificate/Diploma/Baccalaureus Technologiae Degree/Masters Diploma in Technology/Magister Technologiae Degree/Doctor Technologiae Degree).

Table 6-1 Level of academic qualification of expatriate academics for 2005/2010/2012

Qualification	2005		2010		2012	
	Frequency	Percentage	Frequency	Percentage	Frequency	Percentage
Undergraduate Degree/Diploma	32	4.6	33	3.1	30	1.9
Postgraduate Degree/Diploma	7	1	25	1.8	14	0.9
Honours	27	3.9	39	2.9	49	3.1
Masters	167	23.8	349	25.6	429	27.3
Doctoral	382	54.5	778	57.1	946	60.3
Other	66	10.1	128	8.4	101	5.8

The majority of expatriate academics held a doctoral degree as their highest qualification in 2005 (54.5%). The second highest qualification category was for the Masters' degree (23.8%), followed by those who held other qualifications (10.1%). For 2010, the highest qualification held by the majority of expatriate academics was again a doctoral degree (57.1%), followed by a Masters' qualification (25.6%), and then other qualifications (8.4%). The highest qualification held by expatriate academics for 2012 was the doctoral degree (60.3%), with those holding a Masters' degree at 27.3%, and the third highest category was once again those with other qualifications (5.8%).

The trend for the period 2005-2012 demonstrates that expatriate academics are very highly qualified individuals with the majority of expatriate academics over this period holding a doctoral degree. These findings prove that the expatriate academics in SA higher education institutions are a highly educated, highly skilled and highly qualified group of individuals.

6.2.4 Country of origin

The countries of origin for expatriate academics in SA higher education institutions were categorized into the following countries and regions: ZIM (Zimbabwe), ZAM (Zambia), TAN (Tanzania), SWA (Swaziland), SOU (South America), OTH (other African countries), NOR (North America), NAM (Namibia), MOZ (Mozambique), MAU (Mauritius), MAL (Malawi), MAD (Madagascar), LES (Lesotho), EUR (Europe), DEM (Democratic Republic of Congo), BOT (Botswana), AUS (Australia), ANG (Angola) and AIS (Asian countries).

In Figure 6.3, in 2005, the highest number of expatriate academics in SA higher education institutions came from Europe (34.1%). These were then followed by those from other African countries (24.1%) and then those from Zimbabwe (16.4%). In terms of SADC countries, the majority of expatriate academics came from Zimbabwe (16.4%), followed by those from Zambia (4.6%) and then Malawi (2.3%). Asian countries contributed 4.4% of the total number of expatriate academics for 2005. Australia contributed 1.7% of academics for 2005, while North and South America together made up 7.6% of the total number of academics coming into SA higher education institutions.

In Figure 6.3, in 2010, the highest number of expatriate academics in SA higher education institutions came from Europe (27.1%). The next highest group was from other African countries (23.4%) followed by those from Zimbabwe (23.3%). In terms of SADC countries,

once again Zimbabwean academics make up the majority (23.3%), followed by those from Zambia (2.4%) and then those from Botswana, Lesotho and Malawi each with 2.1%. Asian countries made up 6.4% of the total number of expatriate academics coming into SA higher education institutions. Australia contributed 1.4% of the total number of academics coming in for 2010, while North and South America together made up 6.3% of the total number of expatriate academics for 2010.

A change in this trend can be seen in 2012 when highest number of expatriate academics came from Zimbabwe (26.6%). They were followed by academics from Europe (23.5%) and then by those from other African countries (22.7%). In terms of SADC countries, Zambia once again was the second largest supplier of academics to South Africa (3.2%), with the Democratic Republic of Congo (2.2%) next. Australian academics made up 1% of the total number of academics coming into South Africa, while Asian countries make up 4.6%, with North and South America together making up 6.9% of the total number of expatriate academics entering SA higher education institutions.

Over the period 2005/2010/2012, European academics made up (84.7%) (2005-23.5%+2010-27.1+2012-34.1%), other African academics made up (69.5%) (2005-22.7%+2010-22.7%+2012-24.1%) and Zimbabwean academics (66.3%) (2005-16.4%+2010-23.3% +2012-26.6%). Figure 6.3 shows evidence that South African higher education institutions are mainly recruiting from African countries, especially from SADC countries (Tanzania, Angola, Botswana, Democratic Republic of Congo, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Swaziland, Zambia and Zimbabwe), while European academics make up the second largest recruitment pool after African academics.

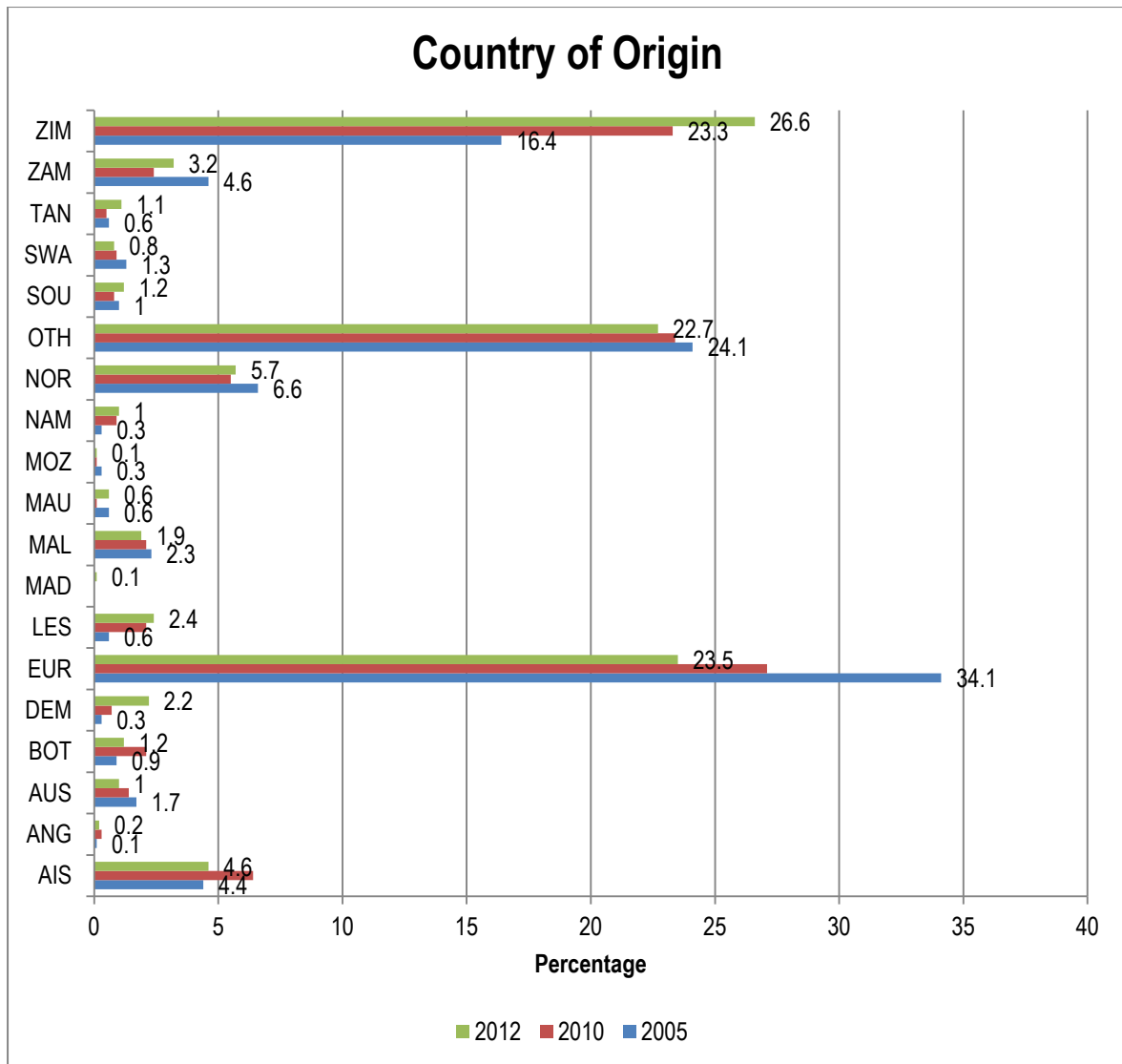


Figure 6-3 Country of origin of expatriate academics for 2005/2010/2012

The statistical analysis (Chi-square test of independence) shows that there is a significant relationship between the year (2005/2010/2012) and country of origin of the foreign academics ($\chi^2 (36, n=3632) = 109.69, p < .0005$). Specifically, in 2005, more than expected came from Europe, Mozambique and Zambia; in 2010, more than expected came from Asia and Botswana; and in 2012 more than expected came from the Democratic Republic of Congo, Lesotho and Zimbabwe. This indicates that more expatriate academics coming to SA are from the SADC region than in previous years.

In the next section, the higher education institutions in SA have been ranked in terms of the number of expatriate academics employed for 2005/2010/2012.

6.3 Ranking of higher education institutions in terms of the number of expatriate academics employed

Table 6.2 shows that the University of the Witwatersrand (WITS) was ranked first across all three years, with 192 expatriate academics in 2005, with 235 expatriate academics in 2010 and 296 expatriate academics in 2012. Second, again for all three years, was the University of Cape Town (UCT) with 80 expatriate academics for 2005, 234 for 2010 and 262 for 2012.

Rhodes University (RU) was ranked third in 2005 with 74 expatriate academics, but then slipped to twenty-first out of 23 institutions in 2010 with 8 expatriate academics. Then in 2012, RU was ranked ninth with 48 expatriate academics. The University of Limpopo (UL) was ranked fourth in 2005 with 45 expatriate academics; they then slipped to twelfth place in 2010 with 34 expatriate academics and in 2012 they were ranked eleventh with 44 expatriate academics. In 2005, the University of Pretoria (UP) was ranked fifth with 44 expatriate academics; they remained in fifth position in 2010 with 106 expatriate academics and in 2012 with 90 expatriate academics. UKZN was ranked sixth in 2005 with 40 expatriate academics; they then increased the number of expatriate academics in 2010 to 191 and were ranked third, a position they maintained in 2012 with 194 expatriate academics (see Table 6.2). The ranking of South African higher education institutions according to the actual numbers of expatriate academics for the three years 2005/2010/2012 is presented in Appendix I.

Table 6-2 Ranking of higher education institutions in terms of number of expatriate academics employed for 2005/2010/2012

Higher education institutions	2005	2010	2012
University of the Witwatersrand	1	1	1
University of Cape Town	2	2	2
Rhodes University	3	21	9
University of Limpopo	4	12	11
University of Pretoria	5	5	5
University of KwaZulu-Natal	6	3	3
University of South Africa	7	4	4
University of Johannesburg	8	15	18
University of Venda	9	7	6
Tshwane University of Technology	10	8	7
University of Western Cape	11	9	14
North West University	12	13	10
Cape Peninsula University of Technology	13	6	8
University of Fort Hare	14	11	12
Vaal University of Technology	15	18	13
University of Zululand	16	16	15
Central University of Technology, Free State	17	17	17
Nelson Mandela Metropolitan University	18	20	22
Mangosuthu University of Technology	19	23	21
Walter Sisulu University	20	10	20
Durban University of Technology	21	19	19
University of the Free State	22	14	16
University of Stellenbosch	23	22	23

The University of South Africa (UNISA) was ranked seventh in 2005 with 37 expatriate academics; they then recruited more expatriate academics in 2010 with a total of 111 and moved to fourth position, where they remained in 2012 with 102 expatriate academics.

These results illustrate that the two universities that recruited the most expatriate academics over the eight year period remained unchanged, namely, WITS and UCT. The majority of institutions of higher learning in SA show an increase in the number of expatriate academics employed over the eight year cycle, with the exception of RU (Rhodes University), University of Johannesburg (UJ), University of the Western Cape (UWC), University of Fort Hare (UFH), Nelson Mandela Metropolitan University (NMMU) and Walter Sisulu University (WSU).

In the next section, a comparison of the number of SA academics versus the number of expatriate academics is made.

6.4 Comparison of SA academics to expatriate academics for 2005/2010/2012

Firstly, a description of the proportion of SA versus expatriate academics across 2005/2010/2012 is presented. Secondly, a comparison of qualifications between SA and expatriate academics has been done. Thirdly, a comparison of the age and gender between SA and expatriate academics has been done.

6.4.1 Proportion of SA versus expatriate academics

Table 6.3 compares the number of SA academics to expatriate academics across the three years 2005/2010/2012. Over the period represented, the number of expatriate academics has steadily increased from 4.6% in 2005, to 8.2% in 2010 and finally to 9% in 2012. However, when compared to the number of SA nationals in higher education institutions across the three years, it can be seen that the latter make up the majority of academic staff. However, the number of South African academics has dropped from 92.6% in 2005 to 87.8% in 2012, indicating a staff turnover of more than 1134 over an eight-year period.

Table 6-3 Proportion of South African versus expatriate academics across 2005/2010/2012

Year			Frequency	Percent
2005	Valid	Not specified	434	2.8
		Other	701	4.6
		SA	14180	92.6
		Total	15315	100.0
2010	Valid	Not specified	128	.8
		Other	1362	8.2
		SA	15194	91.1
		Total	16684	100.0
2012	Valid	Not specified	568	3.3
		Other	1569	9.0
		SA	15314	87.8
		Total	17451	100.0

Chi-square analysis on records of staff of known nationality shows that significantly more than expected are expatriate academics in 2010 and 2012, while more than expected were SA in 2005 ($\chi^2(2, n=48328) = 257.21, p<.0005$). This trend would signify that more expatriate academics are coming into South Africa than in previous years.

Table 6-4 Chi-square test on proportion of South African versus expatriate academics across 2005/2010/2012

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-square	257.213 ^a	2	.000
Likelihood ratio	275.886	2	.000
Linear-by-linear association	256.327	1	.000
N of valid cases	48320		
a. 0 cells (.0%) have expected count less than 5. The minimum expected count is 1118.54.			

In the next section, the qualifications held by SA and expatriate academics is compared.

6.4.2 Comparison of qualifications: SA vs expatriate academics

In order to simplify the analysis, qualifications have been grouped as follows:

- Undergraduate (Undergraduate diploma/certificate; General academic Bachelor’s degree; Professional First bachelor’s Degree)
- Postgraduate (Postgraduate Diploma/Certificate; Postgraduate Bachelor’s degree)
- Honours
- Masters
- Doctorate
- National Diploma/Certificate (Undergraduate Diploma/certificate; National Certificate; National Higher Certificate; National Diploma; Post-diploma Diploma; National Higher Diploma)
- Academic Technical (Baccalaureus Technologiae (B.Tech); Masters Diploma in Technology; Magister Technologiae (M.Tech); Doctor Technologiae (DTech).
- Other qualifications.

Table 6.5 demonstrates that in 2005, expatriate academics held more doctoral degrees (54.5%) than their SA counterparts (28.4%), although SA academics held more Honours (9.2%) and Masters degrees (30.5%) than their expatriate academic counterparts. A similar situation to the previous one exists for technical qualifications such as B.Tech, M.Tech and D.Tech qualifications (5.1%) where SA academics hold more of these qualifications than their expatriate colleagues.

Table 6-5 A comparison of qualifications held by South African and expatriate academics for 2005

2005	Qualification	SA		Non-SA	
		Frequency	%	Frequency	%
	Undergraduate	1835	12.7	27	3.8
	Post-graduate	583	4.1	7	1
	Honours	13099	9.2	27	3.9
	Masters	4318	30.5	167	23.8
	Doctorate	3970	28.4	382	54.5
	Academic Technical	718	5.1	5	0.6
	Other	1019	7.2	55	7.8

In 2010, as illustrated in Table 6.6 below, more expatriate academics held doctoral degrees (57.1%) than their SA counterparts (32.9%). SA academics held more Masters (32.7%) and Honours degrees (8.3%) than their expatriate counterparts. In terms of technical qualifications, SA academics held more qualifications (6.7%) than their expatriate counterparts (2.2%).

Table 6-6 A comparison of qualifications held by South African and expatriate academics for 2010

2010	Qualification	SA		Non-SA	
		Frequency	%	Frequency	%
	Undergraduate	1090	7.9	31	2.2
	Postgraduate	500	3.2	21	2.4
	Honours	1255	8.3	39	2.9
	Masters	4976	32.7	349	25.6
	Doctorate	5001	32.9	778	57.1
	National Diploma/Certificate	469	3.1	4	0.3
	Academic Technical	1033	6.7	31	2.2
	Other	767	5	91	6.7

Table 6.7 demonstrates that in 2012 once again expatriate academics held the most doctoral degrees (60.3%) in comparison to their SA counterparts (35.2%), while SA academics still held more Masters (32.3%) and Honours qualifications (9.8%). With regard to technical qualifications, SA academics accounted for 6.7% and expatriate academics only 2.9%.

Table 6-7 A comparison of qualifications held by South African and expatriate academics for 2012

2012	Qualification	SA		Non-SA	
		Frequency	%	Frequency	%
	Undergraduate	982	6.8	31	2.6
	Postgraduate	431	2.8	14	0.9
	Honours	1497	9.8	49	3.1
	Masters	4944	32.3	429	27.3
	Doctorate	5386	35.2	946	60.3
	National Diploma/Certificate	11	0.1	6	0.4
	Academic Technical	1014	6.7	45	2.9
	Other	589	3.8	46	2.9

These results establish that expatriate academics in SA higher education institutions are highly qualified, mostly with doctoral degrees, and that they have steadily increased in

proportion from 2005 (54.5%) to 2012 (60.3%). Chi-square test of independence (or Fisher's exact, where conditions are not met) was applied to see if there is a significant relationship between SA/expatriate academics and qualifications for each of the three years. The results show that in 2005 significantly more than expected expatriate academics had a doctoral degree (χ^2 (19, n=14679) = 290.00, p<.0005). In 2010, significantly more expatriate academics had a doctoral degree or another qualification, while more than expected of the SA academics had a national higher diploma, a B.Tech., Honours, Masters or Professional first bachelor's degree (χ^2 (22, n=16556) = 417.27, p<.0005). In 2012, significantly more expatriate academics had doctoral degrees, undergraduate diplomas or certificates or Bachelor's degrees (3 years), while local academics were qualified with more national higher diplomas or B.Tech., Honours, postgraduate Bachelor's or Bachelor's degrees (χ^2 (27, n=16883) = 491.21, p<.0005). This trend would serve as evidence that expatriate academics are better qualified in terms of skills and qualifications than their South African counterparts.

In the next section a comparison of the age and gender of SA versus expatriate academics over the three years 2005/2010/2012 is presented.

6.4.3 Comparison of age and gender: SA vs non-SA

In Table 6.8 a comparison of the age of SA versus expatriate academics for 2005/2010/2012 is made. Firstly, for 2005, the average age of SA academics was 43.44, while the average age of expatriate academics was 44.03. This shows that South African academics were slightly younger than expatriate academics on average for 2005. Secondly, in 2010, the average age for expatriate academics was 42.90 while the average age for SA academics was 44.56. Finally, for 2012, the average age for expatriate academics was once again 42.9 while the average age for SA academics was 44.74.

Table 6-8 A comparison of the age of South African and expatriate academics for 2005/2010/2012

Year	SA or other	n	Mean	Std. deviation	
2005	Age	Other	701	44.03	9.26
		SA	14180	43.44	9.90
2010	Age	Other	1362	42.90	9.43
		SA	15194	44.56	10.36
2012	Age	Other	1569	42.90	9.19
		SA	15314	44.74	10.43

Chi-square tests illustrate that while the average age is not significantly different in 2005 for the two groups, that is SA and expatriate academics, there is a significant difference in 2010 ($Z(n=16556) = -6.13$, p<.0005) and 2012 ($Z(n=16883) = -7.25$, p<.0005). Over the three

years, results indicate that the average age for SA academics is higher than for non-SA academics. Also, expatriate academics are coming into SA at a younger age than in previous years.

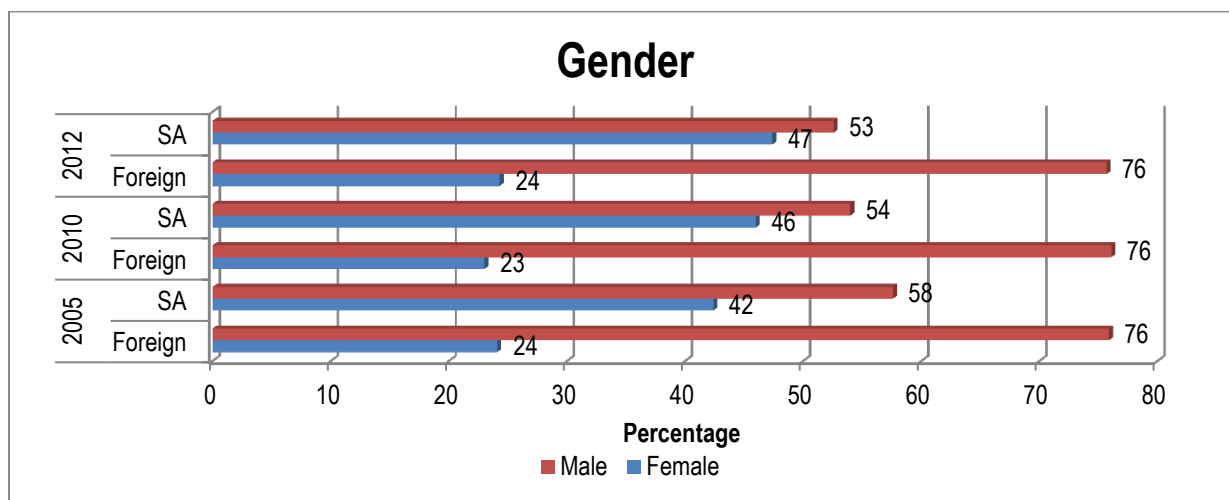


Figure 6-4 A comparison of the gender of South African versus expatriate academics across the three years 2005/2010/2012

Figure 6.4 illustrates a comparison of the distribution of gender for SA academics versus expatriate academics for the three years 2005/2010/2012. The analysis also shows that for 2005 there are significantly more males than females amongst SA academics (58% male) and more males than females amongst expatriate academics, 2005 - ($\chi^2(1, n=14881) = 92.21, p<.0005$). In 2010, there are significantly more males than females among SA academics (54%) and more males than females amongst expatriate academics ($\chi^2(1, n=16556) = 248.93, p<.0005$). In 2012, there are significantly more males (53%) than females amongst SA academics and more males than females amongst expatriate academics too ($\chi^2(1, n=16883) = 306.35, p<.0005$). The gender patterns over the three years amongst expatriate academics and SA academics points towards more male academics than female academics for both groups.

The context in which this study takes place is the University of KwaZulu-Natal. In the next section, the staff profile of the University was investigated to compare SA to expatriate academic staff in terms of age, gender, qualifications, field of study and level of academic post for 2005/2010/2012. This was done in order to establish how the profile of academic staff at UKZN compares to that of that of the SA higher education landscape.

6.5 A comparison of South African to expatriate academic staff for 2005/2010/2012 at UKZN

UKZN has been selected to be the case under investigation in this study. An analysis of the national trends showed that UKZN has been placed in the top ten recipient institutions with expatriate academics for the last eight years. In fact, it has been placed third consistently since 2010. In the next section, a comparison of the gender of SA versus expatriate academics at UKZN is presented.

6.5.1 A comparison of the gender of South African versus expatriate academics at UKZN for 2005/2010/2012

Table 6.9 shows a comparison of the gender of SA academic staff and expatriate academic staff. Over the three years, there has been more female SA staff at UKZN than males. In 2005, there were 55.8% SA females employed at the university. In 2010, 50.6% of SA academics employed here were female and in 2012, 51.6% of SA academics were female.

Table 6-9 Gender of academic staff at UKZN for 2005/2010/2012

	Male		Female	
	Frequency	%	Frequency	%
2005				
South African	566	40.2	842	55.8
Expatriate	37	92.5	3	7.5
2010				
South African	599	49.4	613	50.6
Expatriate	153	80	38	20
2012				
South African	572	48.4	610	51.6
Expatriate	151	77.8	43	22.2

This pattern is very different from the national norm, where the majority of SA academics are male over the three years.

Expatriate academics employed at UKZN over the three years have also been predominantly male. In 2005, 92.5% of the expatriate academics employed at UKZN were male. In 2010, 80% were male and in 2012, 77.8% were male. This is consistent with the national norm, where more male expatriate academics than female were employed in SA higher education institutions. The trend revealed here is that there are significantly more male expatriate academics employed at UKZN than SA males across the three years.

6.5.2 Comparison of the age of South African academics and expatriate academics

In Table 6.10 a comparison of the ages of SA and Expatriate academics at UKZN for the three years is presented. Over the three year period, the average age has remained consistent for both SA and expatriate academics at the University.

Table 6-10 Ages of South African and expatriate academic staff at UKZN 2005/2010/2012

	Nationality	Frequency	Mean
2005	SA	1408	43.20
	EXPAT	40	42.23
2010	SA	1212	43.81
	EXPAT	191	43.40
2012	SA	1182	43.95
	EXPAT	194	43.41

The results indicate that there are no significant differences in the average ages of SA academics and expatriate academics at UKZN for 2005/2010/2012. These findings are consistent with the national findings since there were no significant differences in age between SA and expatriate academics employed nationally. However, the average age of expatriate academics is lower than that of the national average for 2005 and higher than that for 2010 and 2012.

Table 6-11 Distribution of expatriate academics at UKZN according to age groups

Age groups of expatriate academics		
	60+	3.4
	50-59	30.4
	40-49	39.1
	30-39	28.4

Table 6.11 reveals that the majority of expatriate academics at UKZN fall into the 40-49 age group. Those that fall into the 50-59 age groups make up 30.4% of the total number of expatriate academics at UKZN.

In the next section, the countries of origin of expatriate academics at UKZN is presented and compared to the national trends.

6.5.3 Country of origin of expatriate academics

Table 6.12 reveals the trends regarding the countries of origin of expatriate academics at UKZN for 2005/2010/2012. In 2005, other African countries supplied 25% of the total number of expatriate academics at UKZN, while Europe and Zimbabwe each supplied 20%

of the total number of expatriates. This is in contrast to the national norm in 2005, where Europe was the major supplier of expatriate academics to SA higher education institutions. In 2010, other African countries remain the main supply region of expatriate academics (28.3%) to UKZN, Europe is again the second largest contributor of expatriate academics to UKZN (25.7%) and Zimbabwe is third (22%). When comparing these statistics to those of the national norms for 2010, once again there is a different pattern, as Europe was once again the major supplier of expatriate academics to SA higher education institutions.

In 2012, the major supplier of expatriate academics to UKZN was Zimbabwe with 27.8%; other African countries were second with 26.8% and Europe was third with 21.1%. This is consistent with national norms for 2012, where Zimbabwe was the largest supplier of expatriate academics to SA higher education institutions. However, second and third positions are reversed, with Europe second and other African countries third.

Table 6-12 Country of origin of expatriate academics for 2005/2010/2012 at UKZN

Nationality	2005		2010		2012	
	<i>Frequency</i>	<i>%</i>	<i>Frequency</i>	<i>%</i>	<i>Frequency</i>	<i>%</i>
AIS	1	2.5	26	13.6	15	7.7
ANG	1	2.5	1	.5	1	.5
BOT	2	5.0	0	0	1	.5
EUR	8	20.0	49	25.7	41	21.1
LES	1	2.5	4	2.1	4	2.1
MAL	1	2.5	2	1.0	2	1.0
MOZ	1	2.5	0	0	0	0
MAU	0	0	0	0	3	1.5
NOR	3	7.5	5	2.6	5	2.6
OTH	10	25.0	54	28.3	52	26.8
SOU	0	0	2	1.0	2	1.0
SWA	1	2.5	2	1.0	2	1.0
TAN	0	0	0	0	5	2.6
ZAM	3	7.5	4	2.1	7	3.6
ZIM	8	20.0	42	22.0	54	27.8
Total	40	100.0	191	100.0	194	100.0

It is important to note that the analysis of the findings in terms of countries of origin may in fact be presented as regions as well as individual countries. Thus, Europe represents a supply region and not a single country and this is the same for other African countries. If one were to then group the countries on the list above into regions, such as SADC, then the trends would look a little different. SADC countries include Tanzania, Angola, Botswana, Democratic Republic of Congo, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Swaziland, Zambia and Zimbabwe and, if one were to combine the totals for each of these countries, then one would find that over the three years SADC countries account for the highest number of expatriate academics supplied to UKZN. For 2005, 47.5% of all

expatriate academics at UKZN came from SADC countries. In 2010 and 2012 respectively, 28.7% of all expatriate academics and 40.6% of expatriate academics at UKZN came from SADC countries. This is in line with the national trend over the three years of an increasing number of expatriate academics coming from African, especially SADC countries.

In the next section, the field of study of expatriate academics at UKZN is presented.

6.5.4 Field of study of expatriate academics at UKZN

In Table 6.13 the proportion of expatriate academics at UKZN in terms of fields of study is illustrated. The overwhelming majority (62.2%) of expatriate academics at UKZN are in the College of Engineering, Agriculture and Science.

Table 6-13 Fields of study of expatriate academics at UKZN

Field of study	Category	%
	Engineering, Agriculture and Science	62.2
	Humanities	21.6
	Law and Management Studies	11.5
	Health Sciences	4.7

The College of Engineering, Agriculture and Science comprises the departments of Engineering, Agriculture, Earth and Environmental Science, Chemistry and Physics, Life Science, Mathematics, Statistics and Computer Science. Humanities is home to 21.6% of expatriate academics at UKZN; the disciplines housed in the College of Humanities include Applied Human sciences, Arts, Built Environment and Development Studies, Education, Religion, Philosophy, Classics and Social Science. The proportion of expatriates in the College of Law and Management Studies is 11.5%. The College includes the disciplines of Business and Leadership, Accounting, Economics, Finance, Law, Management, Information Systems and Governance. Finally, 4.7% of all expatriate academics at UKZN are found in the College of Health Sciences, which comprises the disciplines of Clinical Medicine, Health Sciences, Laboratory Medicine and Medical Sciences, and Nursing and Public Health.

In the next section, the level of academic posts held by expatriate academics at UKZN is presented.

6.5.5 Level of academic posts held by expatriate academics at UKZN

Table 6.14 shows the level of academic posts held by expatriate academics at UKZN. The majority of expatriate academics are at the level of lecturer (35.1%). This is the lowest level in terms of academic postings. Next is the senior lecturer level with 28.4% and then the associate professor level with 22.9%. These results indicate that the majority of expatriate academics do not hold leadership or management portfolios at the university, with only 7.4% being professors and 3.7% being a dean or head of a school.

Table 6-14 Level of academic posts held by expatriate academics at UKZN

Academic post	Category	%
	Dean/Head of School	3.7
	Professor	7.4
	Associate Professor	22.9
	Senior Lecturer	28.4
	Lecturer	35.1
	Temporary Lecturer	2.7

6.5.6 A comparison of South African and expatriate academics qualifications at UKZN

From Table 6.15, it is clear that expatriate academics hold almost double the number of doctorate degrees than their SA colleagues do at UKZN. More than two-thirds of expatriate academic staff at UKZN have doctoral degrees versus 36.9% of their SA colleagues, while SA academics hold more Honours, Masters and Bachelor's degrees than their expatriate academic counterparts.

Table 6-15 A comparison between the level of qualifications held by South African and expatriate academics at UKZN

Qualification	Bachelor's degree		Professional first bachelor's degree		Honours		Masters		Doctorate	
	F	%	F	%	F	%	F	%	F	%
South African	48	3.49	25	1.81	69	5.01	395	28.7	508	36.9
Expatriate	7	3.6	0	0	1	0.5	48	24.7	135	69.58

6.6 Conclusion

In this chapter, the results of Phase 1 of this study were presented. The aim of Phase 1 was to examine the demographic profile of academic staff at SA higher education institutions with regard to the demographic profile of expatriate academics in SA higher education institutions over three years 2005/2010/2012. It was found that the number of expatriate academics had increased over the eight year period while the number of SA academics had dropped. Results

illustrate that the average age of expatriate academics ranged from 44.03 in 2005 to 42.9 years in 2012. Results indicate that more male than female expatriate academics came into SA higher education institutions. On average, around 75% of all expatriate academics for this eight year period were male. Expatriate academics are very highly qualified individuals with more than 55% having doctoral degrees in the period investigated. It was also found that the majority of expatriate academics in SA are from African countries, with Zimbabwe being the largest single country supplier. In terms of regional suppliers, SADC countries are first, followed by Europe and then other African countries.

The results of the survey found that the WITS was placed first as an employer of expatriate academics, followed by the UCT over the three years. It was also found that most universities in South Africa had shown an increase in the number of expatriate academics employed from 2005 to 2012, with some exceptions.

When a comparison of SA versus expatriate academics over the three years was made, it was found that there was a steady increase in the number of expatriate academics at SA higher education institutions over the three years 2005/2010/2012. When comparing the qualifications of SA and expatriate academics, it was found that expatriate academics over the three years held more doctoral degrees than their SA counterparts, while SA academics held more Masters and Honours qualifications over the same period. In comparison to their expatriate colleagues, SA academics were slightly older on average. In terms of comparisons by gender over the three years, there were more males than females amongst both expatriates and also SA academics.

Using UKZN as a case study, a comparison of SA and expatriate academic staff was presented. At UKZN there has been a steady increase in the number of expatriate staff employed over the three years 2005/2010/2012. More male than female expatriate academics were employed by UKZN over the three years, this is very different to the gender profile of SA academics at the University. There were little or no differences in the age profile of SA and expatriate academics, with the average age being around 43 years old. There was an even spread across the age groups of expatriate academics at UKZN. The major supply region of expatriate academics to UKZN has been the SADC countries of which Zimbabwe is the largest single country contributor. Second was Europe, followed by other African countries. The majority of expatriate academic staff at UKZN are employed in Engineering, Science and Agriculture.

The level of academic posts held by expatriate academics at UKZN was also examined. It was found that the majority of expatriate academics find themselves in lecturer posts, with some in senior lecturer posts and very few holding top academic posts like that of dean or professor, although, when comparing the levels of academic qualifications of SA and expatriate academics at UKZN, expatriate academics are more highly qualified with more than two-thirds of academics having their doctoral degrees, while their SA counterparts have more Bachelors, Honours and Masters degrees.

This chapter has presented the findings of Phase 1 of the study: Secondary data collection of demographic information concerning the profile of academic staff at SA higher education institutions as well as the demographic profile of academics at UKZN, the context in which this study is located.

Chapter 7

Presentation of Results: Quantitative Phase

7.1 Introduction

This chapter focuses on the second phase of the current study. The purpose of the second phase of the study was to explore the nature of the international career experience amongst expatriate academics at UKZN. Research objectives (5-9) explored this aim in detail focusing on the motivating factors, the international career experience and the career orientation of expatriate academics at UKZN. The procedures and methodology followed to create the self-designed questionnaire and collect the data were dealt with in detail in chapter 5, section 5.6.2. This chapter presents the response rate for the empirical research based on the sample in relation to the population size, followed by how the self-designed questionnaire was developed and validated. Thereafter, the reliability and validity of the self-designed questionnaire is presented. Thereafter, this chapter presents the results of the analysis of the data obtained from the questionnaires that were coded and the responses captured in SPSS 21 (a statistical software program) by the statistician. This software program was used to analyse the data using the descriptive and inferential statistics explained in chapter 5, section 5.6.3. The next section deals with the response rate.

7.2 Response rate

The DMI database was used as a sample frame. This database holds the personnel records for all staff members and students at UKZN. The total population of expatriate staff at the university at the time of the study was 320. These occupied both academic and non-academic positions, like laboratory technicians, academic development officers, research assistants and post-doctoral students, and were therefore not eligible for inclusion in this study. There were 126 expatriate non-academic staff. Therefore only 194 expatriate staff could be classified as academics, in other words they engaged in both teaching and research activities. In any event, further investigation revealed that of the 194 expatriate academics, only 120 met the parameters of the study. 74 expatriate academics did not meet the parameters of the study, that is either they had been employed at UKZN for less than one year or more than ten years.

During the initial contact before the commencement of the actual field work, it was discovered that a number of expatriate academics who had met the parameters of the study, that is, were employed by UKZN for more than one year but less than ten years, were not available to participate in the study for the following reasons: maternity leave (n=5), sabbatical (n=8), emigration (n=3), returned to their home country (n=2) and becoming South African citizens (n=2).

Thus the target sample for this study was one hundred eligible respondents. According to Sekaran and Bougie (2010:294) “a reliable and valid sample should enable us to generalise the findings from the sample to the population under investigation, therefore, the sample statistics should be reliable estimates and reflect the population parameters as closely as possible within a negligible margin of error”.

Each respondent was contacted either by telephone or by email before being sent the questionnaire, which was either emailed or hand delivered. The questionnaire included an informed consent form (See Appendix E). Saunders et al. (2003:123) advised “that a second follow up email should be sent to those who had not responded after three weeks, furthermore those respondents that had still not completed the questionnaire via email were contacted telephonically and face-to-face meetings were held to complete the questionnaire so as to increase the response rate”. In total 100 questionnaires were distributed and a total of 83 completed questionnaires were returned to the researcher. No replies were received from 17 expatriate academics to the request made by the researcher to participate in the study. Therefore the response rate was 83%.

Krejcie and Morgan (1970, cited in Sekaran and Bougie, 2010:295) have provided a table to determine the sample size for a given population that would ensure a good decision model. Thus, for a population size of 100 participants (N), a suitable sample size would be 80 (S) in order to ensure generalisable and reliable results.

A response rate of 83% was arrived at by using the following formula provided by Welman et al. (2007:74):

$$\text{Response rate} = \frac{\text{Number of respondents}}{\text{Total number of eligible participants}} = \frac{83}{100} = 83\%$$

Given the above response rate (83%), the results of the study can be deemed as highly acceptable. The next section deals with how the self-designed questionnaire was developed and validated.

7.3 Instrument development

The initial stage of phase 2 of the study involved the development and validation of the self-designed questionnaire, called the “The Career Experiences of Expatriate Academics at UKZN” that measured the opportunity to expatriate, motivation to expatriate and the actual expatriation experience scales. The steps undertaken in this evolutionary process are discussed in turn below:

7.3.1 Item generation

Items for the questionnaire were designed after extensive reviews of expatriate experience and motivation literature. Statements were structured to extract rich responses from the respondents in this survey format. The original instrument (See Appendix C) consisted of:

Section A: Demographic data (15 items)

Section B: The Expatriation experience

1. Pre-departure phase

1.1 The Opportunity to expatriate: 12 items that covered historical, serendipity and planned action opportunities

1.2 The Decision to expatriate: 16 items that covered adventure/travel, life change, financial, career, family and personal transformation as reasons to relocate

2. Expatriation experience

2.1 Perception of pre-departure phase experience (4 items)

2.2 The Actual expatriation experience: 25 items including two open ended questions

Section C: The “Protean and Boundaryless” Career Attitude scale (PBCA) (Briscoe et al. 2006) (27 items).

7.3.2 *Pilot study*

The pilot study was conducted on a small group of five expatriate academics at the Westville campus of UKZN using the same protocols and procedures as would apply in the actual field work. Suggestions made by participants to improve the questionnaire in the pilot study were as follows:

- use simpler words and remove choices where words had meanings that were too similar
- clarify certain terms
- split cells in responses for certain categories in the questionnaire
- re-organise options from lowest to highest degrees.

7.3.3 *Expert content analysis*

As part of the design process, the draft questionnaire was circulated to experts in the field of research methodology in the College of Law and Management studies (LMS), leading authorities in the field of expatriate academics as well as a leading authority on foreign academic experiences.

The following suggestions for improvements were made:

- reduce the number of open ended questions
- pre-code questions before the analysis phase
- change the use of the word ‘assignment’ to ‘experience’.
- change ‘academic expatriates’ to ‘expatriate academics’
- incorporate ‘realistic job and life previews’ into the pre-departure phase
- remove the word ‘company’ and use ‘university’.

The next section deals with the results of the analysis of the psychometric properties of reliability and validity of the self-designed questionnaire.

7.3.4 Psychometric analysis

Psychometric analysis of the self-designed questionnaire done using Cronbach's alpha and Factor Analysis revealed that, in order to improve the internal consistency and construct validity of the questionnaire, various changes that needed to be made which are discussed below. The following sub-scales were affected: Opportunity to expatriate, Motivation to expatriate and Expatriation experience.

7.3.4.1 Opportunity to Expatriate sub-scale

Table 7-1 Original factors and their pre-coded items in the Opportunity to Expatriate sub-scale

Opportunity to Expatriate sub-scale	
Factors	Original Items
Historical	1/2/3/4
Serendipity	5/6/7
Planned Action	8/9/10/11/12

After running inter-item reliability tests, it was found that items 1, 3, 5, 7, 9, 10 and 11 exhibited poor reliability. Once these items were removed the remainder of the items, that is 2, 4, 6, 8, 12 were left. Almost 60% of the sub-scale was found to be unreliable and upon closer inspection of the other sub-scales, it was found that these concepts were covered by other items in the scale in a more reliable manner. Therefore a decision was made to remove the 'Opportunity to expatriate sub-scale' from the questionnaire altogether. The results of the inter-item reliability tests run on this sub-scale are presented in Appendix D.

Table 7-2 Original statements for components in the Opportunity to Expatriate sub-scale

Opportunity to Expatriate sub-scale		
Historical	1	Family connections in South Africa
	2	Studied here during the undergraduate/postgrad phase
	3	Have worked in South Africa previously
	4	Have worked in other countries previously
Serendipity	5	Chance (opportunity, option, possibility)
	6	Luck (fate, destiny, good fortune)
	7	Coincidence (fluke, accidental, happenstance)
Planned action	8	Economic necessity (the economic situation in own country is unstable)
	9	Political turmoil (own country is experiencing political turmoil and violence)
	10	Opportunity for promotion
	11	Better benefits
	12	Other reasons that you may find applicable that are not listed above

7.3.4.2 Motivation to Expatriate sub-scale

After running inter-item reliability tests, all items on this sub-scale were found to be reliable. Therefore these items would be used in further statistical analysis of the results of the questionnaire.

Table 7-3 Original factors and their pre-coded items in the Motivation to Expatriate sub-scale

Motivation to Expatriate sub-scale	
Factors	Original Items
Seeking Adventure/Travel	13/14
Lifestyle Change	15/16/17
Financial Reasons	18/19
Career Matters	20/21/22
Family Matters	23/24/25/26/27/28/42
Personal Transformation	29/30/31/32

During Factor Analysis, the component, Personal Transformation was removed as statements loaded more significantly on to other components. The Family component was further broken down into Concern for Children and Family as certain statements dealt specifically with issues concerning children while others dealt specifically with issues dealing with extended family. Therefore, in the final statistical analysis, the following components and loadings were used.

Table 7-4 Original statements for components of the Motivation to Expatriate sub-scale

Seeking Adventure/Travel	13	Challenge to self
	14	Opportunity to see new places, meet new people, experience different cultures
Lifestyle Change	15	Boredom with old routine
	16	Dealing with personal problems
	17	Reinventing oneself
	31	Searching for one's life purpose
Financial Reasons	18	Better salary
	19	Better benefits
Career Matters	20	Career advancement
	21	Pursuit of meaningful and challenging work
	22	Overcome career plateauing/stagnation
	29	Self discovery
	30	Personal growth
Family Matters	32	Acquisition of new knowledge
	23	Aging and elderly parents
	24	Extended family
Concerns for Safety and Security of Children	25	Spouse/partner presented with job opportunity in SA
	26	Better education for children
	27	Concerns for safety and security of children
	28	Quality of life

7.3.4.3 Expatriation Experience sub-scale

After running inter-item reliability tests, it was found that items 34, 36, 39, 56, 57, 49, 52, 53 and 58 needed to be removed in order to improve reliability of the sub-scale. The results of the inter-item reliability tests run on this sub-scale are presented in Appendix D.

Table 7-5 Factors in the Expatriation Experience scale with original items

Expatriation Experience	
Factors	Original Items
Pre-Departure	34/35/36/37
Fulfillment of Expectations	38/39/40/56/57
Family and Friends Support	41/42/43/44
Work Support (School/University)	45/49/50/51/52/53/54/55/58
Community Support	46/47/48

Items needed to be removed from this sub-scale in order to improve reliability. Therefore, going forward, the components of the Expatriation Experience sub-scale now consist of the items listed below in Table 7.6.

Table 7-6 Original statements for the components of the Expatriation Experience sub-scale

Pre-Departure Phase	35	The university offered my family and me a high level of support during the pre-departure phase.
	37	My expectations of my living conditions were based on realistic living previews.
Family and Friends	41	My spouse and children have played an important role in my overall experience of expatriation.
	42	My family and friends in my home country were supportive of my decision to expatriate to South Africa.
	43	My family and I maintain close ties with family and friends back home.
	44	My colleagues at my old institution in my previous country were supportive of my decision to expatriate to South Africa.
Fulfillment of Workplace Expectations	38	My expectations regarding my work situation have not been met.
	40	My expectations regarding my work situation have been exceeded.
University Community Support	47	Other expatriates in the university community have expressed interests in networking with me.
	48	Other expatriates in the community where I live have expressed an interest in establishing contact with me.
	49	On taking up my new position, the university offered support to my family for e.g. accommodation, finding schools for the children, helping the spouse get employment, etc.
School Support	45	My school is a collegial place to work.
	50	My school has helped me with the challenges I have faced in my teaching.
	51	My school has helped me in pursuing my research activities.
	54	I have received excellent collegial support in this school.
	55	Working in this school is intellectually stimulating.

The psychometric properties of reliability and validity were assessed using Factor Analysis and Cronbach's alpha coefficient. Once the items with poor reliability were removed and inter-item reliability was established, and component factor analysis was run in order to determine the factorial validity of the items on the two sub-scales, further statistical analysis of the questionnaire was now possible.

7.4 Reliability and validity

Once the internal consistency and construct validity of the instrument was established, psychometric analysis of the questionnaire followed.

7.4.1 Motivation to Expatriate sub-scale

The Motivation to Expatriate sub-scale consisted of components that examined expatriate academics' reasons for relocating to South Africa. The reliability for the components used in the Motivation to Expatriate sub-scale is shown in Table 7.7 below.

Table 7-7 Reliability statistics for the Motivation to Expatriate sub-scale

Scales	Cronbach's alpha	No. of items
Overall	.844	20
Adventure/Travel	.750	2
Life Change	.714	4
Financial	.948	2
Career	.870	6
Family	.620	3
Concern for Children	.679	3

According to Sekaran and Bougie (2010:289), "the closer to 1 Cronbach's coefficient alpha is, the higher the internal consistency reliability". Cooper and Schindler (2003:134) "explain that a Cronbach's alpha value of above 0.5 is regarded as an indication of reliability". Table 7.7 shows that the Cronbach's alpha for the Motivation to Expatriate sub-scale ranges from 0.620 to 0.948. Therefore, the internal consistency reliability of the 'Motivation to Expatriate' sub-scale used here is considered to be acceptable. The Validity (Factor Analysis) results for the items comprising the Motivation to Expatriate sub-scale are shown in Table 7.8 and 7.9 below.

Table 7-8 Factor Analysis results of the Motivation to Expatriate sub-scale using KMO and Bartlett's Test

Kaiser-Meyer-Olkin Measure of Sampling Adequacy		.701
Bartlett's Test of Sphericity	Approx. Chi-Square	784.803
	df	190
	Sig.	.000

According to Hair, Anderson, Tatham and Black (2010:67), "the KMO Measure of Sampling Adequacy (MSA) must be 0.60 or higher in order to be acceptable". Table 7.8 shows that the MSA is 0.701 and therefore Bartlett's Test is significant, indicating that the data set complies with the requirements of sampling adequacy and sphericity for Factor Analysis to be performed.

The Principle Component Analysis extracted six (6) components (Factors), listed below, and a Verimax Rotation was conducted to make the components (Factors) interpretable. The results are shown in Table 7.9 below.

Table 7-9 Rotated Component Matrix for the Motivation to Expatriate sub-scale

	Component					
	1	2	3	4	5	6
B13						.863
B14						.807
B15		.573				
B16		.583				
B17		.769				
B31		.720				
B18			.909			
B19			.912			
B20	.917					
B21	.740					
B22	.493					
B29	.573	.532				
B30	.842					
B32	.704					
B23				.776		
B24				.871		
B25				.576		
B26					.747	
B27					.824	
B28					.570	
Extraction Method: Principal Component Analysis.						
Rotation Method: Varimax with Kaiser Normalization.						
a. Rotation converged in 8 iterations.						

Component 1 (B20, 21, 22, 29, 30, 32) can be labelled Career Matters; it deals with career advancement, pursuit of meaningful and challenging work, overcoming career plateauing or stagnation, self-discovery and the acquisition of new knowledge.

Component 2 (B15, 16, 17, 31) can be labelled Lifestyle Change; it deals with boredom with old routine, dealing with personal problems, reinventing oneself and searching for one's life purpose.

Component 3 (B18, 19) can be labelled as Financial Reasons; it deals with seeking a new job in order to secure a better salary and benefits.

Component 4 (B23, 24, 25) can be labelled as Family Matters; it deals with aging and elderly parents, extended family and the spouse or partner presented with job opportunities in South Africa.

Component 5 (B26, 27, 28) can be labelled as Concerns for safety and security of children; it deals with a better education for children, concerns for safety and security for children and a quality of life.

Component 6 (B13,14) can be labelled Seeking Adventure/Travel; it deals with the challenge to self and the opportunity to see new places, people and experience different cultures.

7.4.2 Expatriation Experience sub-scale

The reliability for the Expatriation Experience sub-scale is shown in Table 7.10 below.

Table 7-10 Reliability statistics for the Expatriation Experience sub-scale

Scales	Cronbach's alpha	No. of items
Overall	.799	16
Pre-Departure Phase	.546	2
Fulfillment of Expectations	.574	2
Family and Friends	.535	4
School Support	.802	5
University Community Support	.655	3

As stated above, the closer to 1 Cronbach's coefficient alpha is, the higher the internal consistency reliability. Table 6.5 shows that the Alpha coefficient ranges from 0.535 to 0.802. Cortina (1993:98) and Neuman (2000) state that "reliability coefficients of less than 0.50 are unacceptable, while those between 0.50 and 0.60 are regarded as significant and those above 0.70 as acceptable". Various authors differ on the interpretation of acceptable or significant results in terms of reliability; however, overall the items in the Expatriation Experience sub-scale have a Cronbach's alpha value of .799 indicating an acceptable to good inter-item reliability for the overall scale.

The Validity (Factor Analysis) results for the Expatriation Experience sub-scale are shown in Tables 7.11 and 7.12 below.

Table 7-11 KMO and Bartlett's Test for the Expatriation Experience sub-scale

Kaiser-Meyer-Olkin Measure of Sampling Adequacy		.660
Bartlett's Test of Sphericity	Approx. Chi-Square	389.946
	df	120
	Sig.	.000

According to Hair et al (2010:243), the "KMO measure of sampling adequacy index ranges from 0 to 1, reaching 1 when each variable is perfectly predicted without any error by other variables". This measure can be interpreted with the following guidelines:

- .80 or above (meritorious)
- .70 or above (middling)
- .60 or above (mediocre)
- .50 or above (miserable)
- below .50 (unacceptable).

Table 7.11 shows that the MSA for the Experience scale is 0.660 and Bartlett’s Test is significant, indicating that the data set complies with the requirements of sampling adequacy and sphericity for Factor Analysis to be performed.

The Principle Component Analysis extracted five components (Factors), listed below, and a Verimax Rotation was conducted to make the components (Factors) interpretable. The results for the Expatriation Experience sub-scale are shown in Table 7.12 below.

Table 7-12 Rotated Component Matrix of the Expatriation Experience sub-scale

	Component				
	1	2	3	4	5
B35			.509		
B37			.712		
B38				.780	
B40				.600	
B41				.705	
B42			.625		
B43					.761
B44			.683		
B45	.758				
B50	.829				
B51	.613				
B54	.728				
B55	.532				
B47		.734			
B48		.841			
B49		.492			
Extraction Method: Principal Component Analysis. Rotation Method: Varimax with Kaiser Normalization. a. Rotation converged in 6 iterations.					

Component 1 (B45, 50, 51, 54, 55) can be labeled School Support; it deals with issues related to the workplace, such as the school being a collegial place to work, helping with challenges faced in teaching, pursuing research activities, providing collegial support and being an intellectually stimulating place to work.

Component 2 (B47, 48, 49) can be labeled University Community Support; it deals with items such as other expatriates in the university having expressed an interest in networking, other expatriates in the community having established contact, the university having provided

support to the family during the ‘onboarding’ phase. Although B49 loads on to component 2, it does not deal with the issues in B47 and B48 and therefore it has been left out of further computations.

Component 3 (B35, 37, 42, 44) can be labeled as Pre-departure phase experience; it deals the expectations of living conditions in South Africa being based on realistic living previews and family, friends and colleagues in the home country being supportive of the decision to expatriate.

Component 4 (B38, 40) can be labeled as Fulfillment of Workplace expectations; it deals with expectations of work situation not being met and the expectations of the work situation being exceeded, as well as the role that spouse and children played in the decision to expatriate.

Component 5 (B43) can be labeled as Family and Friends Support; it deals with the maintenance of close ties with family and friends back home.

The revised questionnaire, named “The career experiences of expatriate academics at UKZN” and used in the exploration of research aim 2 and objectives 5-9 of the study, is presented in Appendix F.

The various components identified in these sub-scales, namely Motivation to Expatriate sub-scale and the Expatriation Experience sub-scale, were statistically sound and were used to conduct other statistical analysis. The results of reliability and validity testing of the “Protean and Boundaryless” Career attitude scale in this study have been already presented in Chapter 5, section 5.6.2.4 and support the findings of other studies that have used this scale both internationally and locally. In any event, to reiterate the Cronbach’s alpha scores for this study, the Self-directed career management (.615), Values driven (.770), Boundaryless mindset (.729) and the Organisational mobility preference (.726). In the next section, the results of the descriptive statistics used to analyse the data gathered by the questionnaire is presented.

7.5 Descriptive statistics

Frequencies and percentages were used to ascertain the characteristics of the sample. This was followed by the interpretations of the overall responses to the dimensions of the scales used in this study. The mean and standard deviations were used for this.

7.5.1 Demographic profile of expatriate academic respondents

In this section, the demographic profile of the sample group of expatriate academics is presented.

7.5.1.1 Age of expatriate academic respondents

As shown in Table 7.13 below, the majority of the sample (33.7%) fell into the age group 41-50, followed closely by the 36-40 group (30.1%), the 50+ group (18.1%) and the 31-35 group (15.7%). Only two respondents fell into the 26-30 age group. It is interesting to note that the majority of respondents in the sample are between the ages of 36-50 years old. This would imply that these respondents are mature adults, well established in their lives and their career trajectories.

Table 7-13 Distribution of expatriate academics according to age categories

Age of expatriate academic respondents	Age group	n	%
	20-25	0	0.0
	26-30	2	2.4
	31-35	13	15.7
	36-40	25	30.1
	41-50	28	33.7
	50+	15	18.1
	Total	83	100.0%

7.5.1.2 Gender

As shown in Figure 7.1 below, the majority of the sample (80.5%) was male while the sample comprised of only 16 females (19.5%). It is important to note that because the majority of the sample is male, this makes it difficult to generalise findings to both sexes. It may also influence the responses to questions asked regarding family matters and concerns over the safety and security of children.

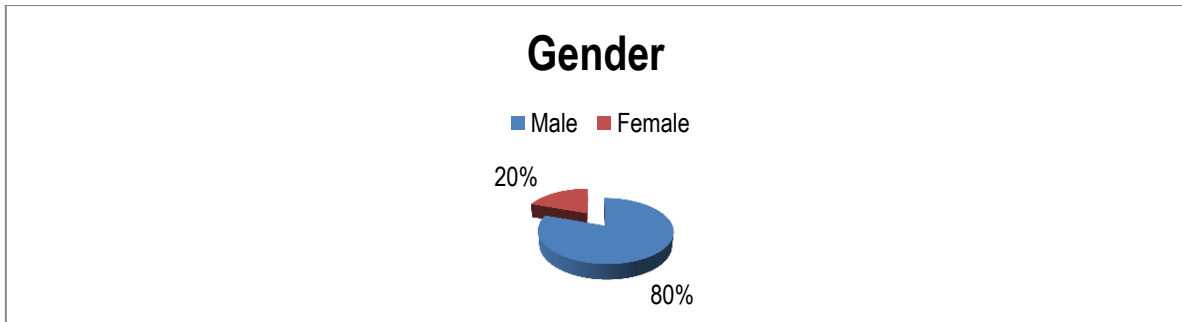


Figure 7-1 Distribution of expatriate academics in the sample according to gender

7.5.1.3 Marital status

Figure 7.2 indicates the marital status of respondents. The majority of the sample (54.2%) is single, while married respondents (45.8%) make up the balance of the group. It is interesting to note that as the majority of respondents are single, this could influence the findings of the study, especially when questions seek answers involving spouses/partners and children.

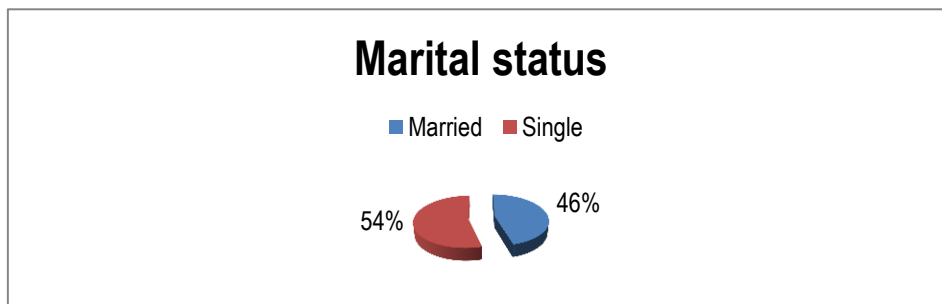


Figure 7-2 Distribution of expatriate academic respondents according to marital status

7.5.1.4 Number of dependents of expatriate academic respondents

Figure 7.3 indicates that the majority of the sample (24.1%) has either two or three children; 22.9% have one child; 18.1% have no children, 7.2% have four children and 3.6% have five children. It is interesting to note that 68 respondents have children but only 48 are married, indicating the sample comprises of those in non-traditional family forms. Also the majority of respondents have either two or three children.

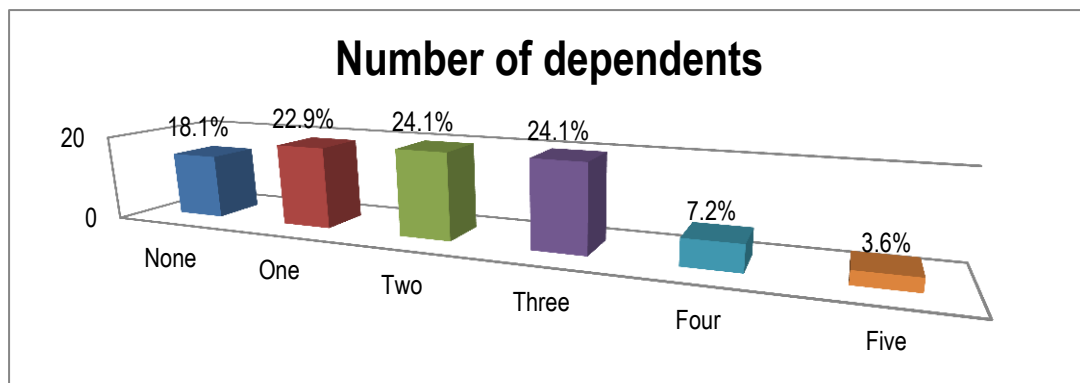


Figure 7-3 Distribution of the number of dependents of expatriate academic respondents

7.5.1.5 Number of dependents < 10 years old

While 39.3% of respondents do not have children younger than ten years old, 30.1% have one child younger than 10; 24.1% have two and, lastly, 4.8% have four. These results indicate that the majority of respondents (60.24%) have children ten years and younger (see Table 7.14. It is of interest to determine whether this affects the results of the study, as families with younger children are considered to have concerns different to those with older children.

Table 7-14 Distribution of dependents of expatriate academics <10 years old

Number of dependents < 10 years old	Children	n	%
	none	33	39.80
	one	25	30.10
	two	20	24.10
	three	1	1.20
	4+	4	4.80
	Total	83	100.00

7.5.1.6 Number of dependents > 11 years old

Table 7.15 indicates that the majority of the sample (63.9%) have no children that are 11 years and older, 10.8% have two, closely followed by those with one child (9.6%), then those with three children (8.4%) and those with more than four children (7.2%). Therefore it appears that most respondents have younger children; as such this variable may not be influential on the results of this study.

Table 7-15 Distribution of number of dependents of expatriate academic respondents >11 years old

Number of dependents >11 years old	Children	n	%
	none	53	63.9
	one	8	9.6
	two	9	10.8
	three	7	8.4
	4+	6	7.2
	Total	83	100

7.5.1.7 Location of the family

The majority of the sample (74.7%) indicated that their family was here with them in South Africa, while only 13 respondents (15.6%) indicated that they were here alone. Eight respondents did not give a response to this question (9.6%) (see Figure 7.4). It is interesting to note that the majority of respondents' families are here in South Africa. This may shape the responses of the subjects regarding family matters and concerns regarding the safety and security of children.

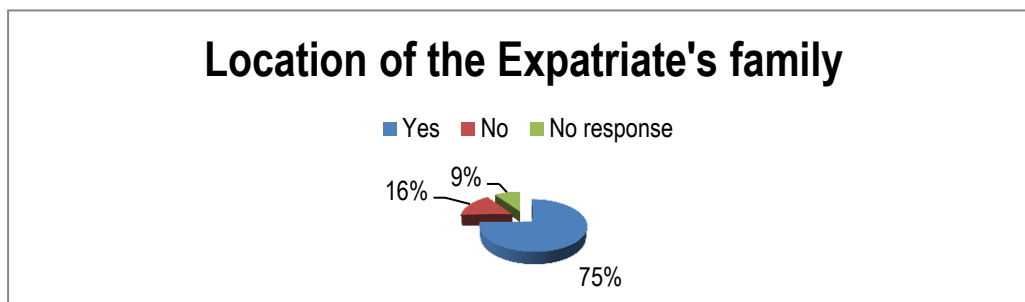


Figure 7-4 Location of the Expatriate's family

7.5.1.8 Country of origin of expatriate academic respondents

Table 7.16 indicates the countries of origin of the respondents. The majority of the sample (27.7%) came from Zimbabwe, followed by India (12.0%), then Nigeria (10.8%): next is Ethiopia (6%), followed by Ghana and Cameroon (4%). Zambia is next with 3 respondents, followed by America, Mauritius, Romania and Tanzania with 2 respondents each. Last, Argentina, Australia, Bangladesh, Belgium, Britain, China, Denmark, Germany, Italy, Lesotho, Malawi and Swaziland each have only one respondent. In terms of regional distribution, Africa is by far the largest supplier of expatriate academics to the university, with 71.7% of the sample, followed by Asia with 12.4%, then Europe with 8.4%, and last the Americas with 3.6%.

Table 7-16 Distribution of countries of origin of expatriate academic respondents

Nationality	Country of origin	n	%
	Zimbabwean	23	27.70%
	Indian	10	12.00%
	Nigerian	9	10.80%
	Ethiopian	5	6%
	Kenyan	5	6%
	Cameroonian	4	4.80%
	Ghanian	4	4.80%
	Zambian	3	3.60%
	American	2	2.40%
	Mauritian	2	2.40%
	Romanian	2	2.40%
	Tanzanian	2	2.40%
	Argentinean	1	1.20%
	Australian	1	1.20%
	Bangladeshi	1	1.20%
	Belgium	1	1.20%
	British	1	1.20%
	Chinese	1	1.20%
	Danish	1	1.20%
German	1	1.20%	
Italian	1	1.20%	
Lesothu	1	1.20%	
Malawian	1	1.20%	
Swazi	1	1.20%	
Total	83	100.00%	

7.5.1.9 Duration of expatriation experience

The majority of the sample (50.6%) has been in the country for between seven and ten years, followed by those who have been here between four and six years (28.9%). Only 20.5% have been here in South Africa for between one and three years.

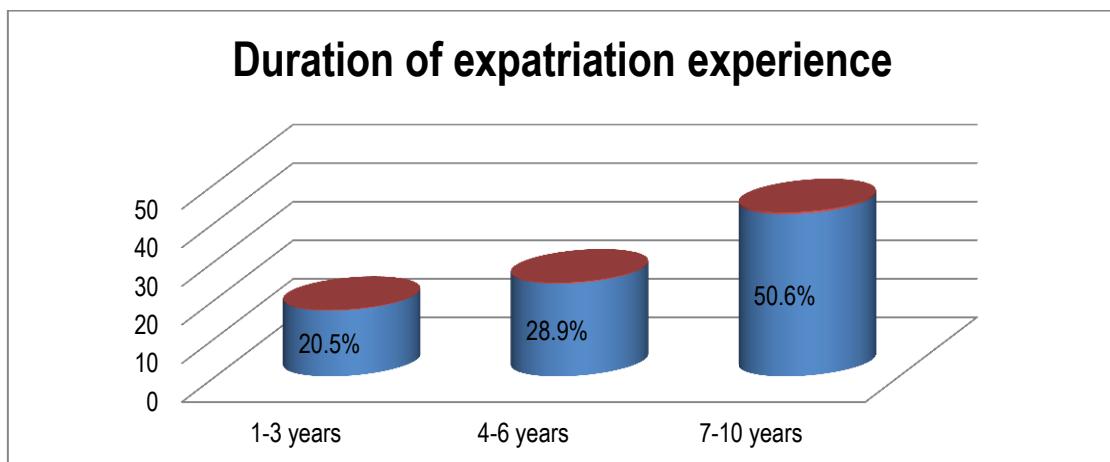


Figure 7-5 Distribution of the duration of expatriation experience of academics

These results may affect the responses of the sample to the questions asked regarding their experiences here, as the longer the period spent here in South Africa, the more likely pertinent details concerning for example their pre-departure phase experience may be forgotten.

7.5.1.10 Occupational history of expatriate academic respondents

The majority of the sample (63.9%) had not worked at any other South African higher education institution before coming to this university, with only thirty respondents having worked at other South African higher education institutions (see Figure 7.6). These results indicate that UKZN selected as the host institution by these academics, who appear to be from mainly SADC countries.



Figure 7-6 Distribution of occupational history of expatriate academic respondents

7.5.1.11 Residential status

Table 7.17 indicates the distribution of the residential status of the respondents. The majority of the sample (50.6%) has been working here in South Africa on a work permit, while others are permanent residents (47%). Only two respondents indicated their status as ‘other’, meaning that they had become South African citizens. These results indicate that the majority of subjects in the sample still have a ‘temporary status’ in South Africa. These results would assist in obtaining the responses concerning the macro-level challenges expatriate academics face in SA.

Table 7-17 Distribution of current residential status of expatriate academic respondents

Current residential status	Status	n	%
	Work Permit	42	50.6%
	Permanent Resident	39	47.0%
	Other	2	2.4%
	Total	83	100.0%

7.5.1.12 Type of employment contract

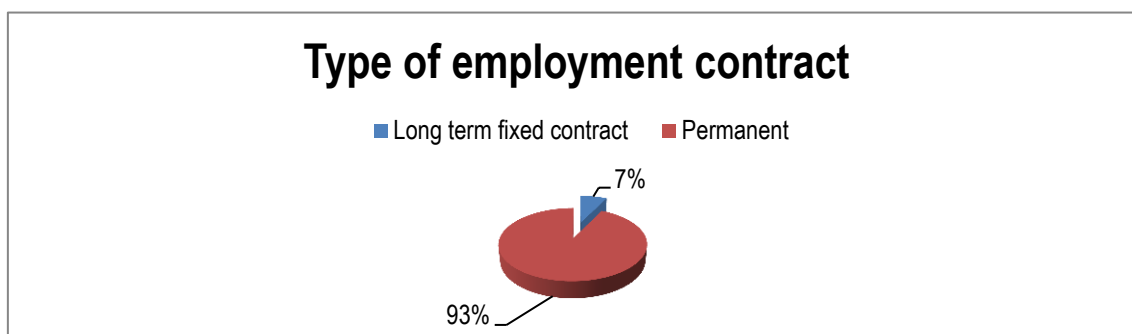


Figure 7-7 Distribution of type of employment contract of expatriate academic respondents

The majority of the sample at UKZN is employed on a permanent basis (92.8%), while only six are employed in long term contract positions (see Figure 7.7). This result seems to indicate that in any event, the ‘temporary status’ of expatriate academics at UKZN does not detract from their ability to secure permanent employment.

7.5.1.13 Length of academic career of expatriate academic respondents

Table 7-18 Distribution of length of academic career of expatriate academics

Length of academic career	Period	n	%
	1-5 years	18	21.7
	6-10 years	26	31.3
	11-15 years	15	18.1
	16+ years	24	28.9
	Total	83	100.00

The length of participants’ careers is indicated in Table 7.18. The majority in the sample have been in academia for between six and ten years (31.3%), followed by those with 16+ years in academia (28.9%); next are those who have been in academia for between one and five years (21.7%). Finally, there are those with 11 to 15 years of experience in academia with only 18 respondents (15.1%). These results indicate that respondents are at an advanced stage on their chosen career paths.

7.5.1.14 Highest academic qualification

Table 7-19 Distribution of highest academic qualifications of expatriate academic respondents

Highest academic qualification	Qualification Level	n	%
	Honours	1	1.2
	Masters	19	22.9
	Doctorate	63	75.9
	Total	83	100.00

The majority of the sample, as shown in Table 7.19, have their doctoral degree (75.9%); they are followed by those with their Masters (22.9%). There was only one respondent with an Honours degree in the sample. These results indicate that the subjects of the sample fall into the group classified as ‘highly skilled workers’. Thus, the findings fit the profile of SIE’s who are classified as being highly qualified and skilled in their chosen professions.

7.5.1.15 Field of study of expatriate academics

The majority of participants (71.1%) came from the College of Science and Agriculture, followed by Law and Management (16.9%); next was Humanities (9.6%). The Health Science College only had two respondents.

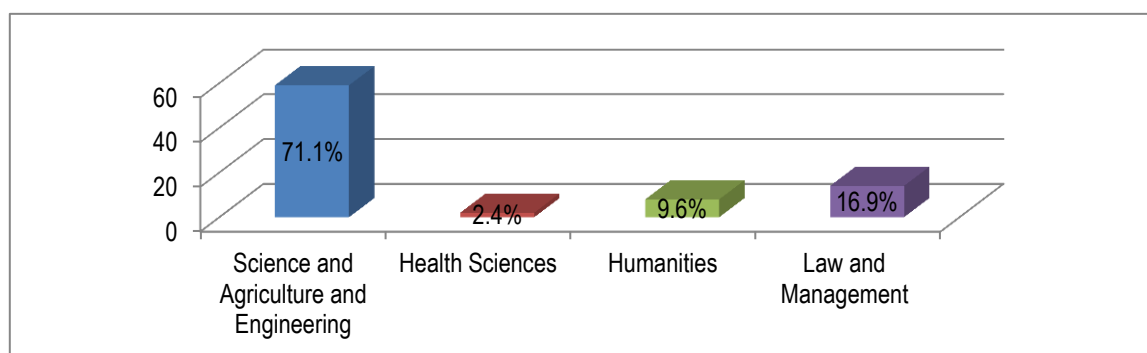


Figure 7-8 Frequency distribution of college of respondents

These findings indicate that the majority of respondents belong to the College of Agriculture, Science and Engineering. This College houses the following disciplines (UKZN, 2014):

- “School of Agriculture, Earth and Environmental Science
- School of Chemistry and Physics
- School of Engineering
- School of Life Sciences
- School of Mathematics, Statistics and Computer Science”

In the context of South Africa’s skills and staff shortages, at UKZN results indicate that respondents have come to fill the gap in UKZN’s capacity to produce sufficient mathematics and science graduates. All of the occupations associated with these disciplines are on the South African Department of Labour’s National Master Scarce Skills list (Ministry of Labour, 2008:1); therefore, in order for the university to run these programmes, highly skilled staff seem to have been internationally sourced in order to meet the demand for suitably qualified academic staff.

7.5.1.16 Level of academic post of expatriate academics

The majority of the sample (48.2%) hold the position of lecturer, followed by those holding a senior lecturer position (22.9%); next are those holding an associate professor position (19.3%), followed by those holding a professorship (7.2%) and, last, two respondents holding a tutor's post. In any event, though the majority of expatriate academics in this sample hold doctoral degrees, many do not hold posts higher than lecturer, the minimum requirement for which is a Masters degree. These results illustrate that there is an under-utilisation of skills, called 'underemployment', a common problem among highly skilled immigrants (Al-Ariss, 2012) at UKZN.

Table 7-20 Distribution of level of academic post held by expatriate academic respondents

Level of academic post	Job Title	n	%
	Tutor	2	2.4
	Lecturer	40	48.2
	Senior Lecturer	19	22.9
	Associate Professor	16	19.3
	Professor	6	7.2
	Total	83	100.00

This concludes the section on the description of the demographic profile of the sample of the study. In the next section, the results of the exploration of the research objectives of this phase of the study using descriptive statistics are presented.

7.6 Results of findings: Descriptive statistics

Descriptive statistics, using Measures of Central Tendency and Dispersion, were used to gather the results of findings for the following research objectives:

5. To determine the motivating factors that led to the decision to relocate amongst expatriate academics at UKZN
6. To investigate expatriate academics experiences of organisational and social support during expatriation at UKZN
7. To determine the career orientation of expatriate academics at UKZN.

7.6.1 Objective 5: To determine the motivating factors that led to the decision to relocate amongst expatriate academics at UKZN

Table 7.21 below lists the components of the Motivation to Expatriate sub-scale in descending order.

Table 7-21 Measure of Central Tendency and Dispersion for the Motivation to Expatriate sub-scale

Components	n	Minimum	Maximum	Mean	Std. Deviation
Career Matters	83	1.00	5.00	3.43	1.06
Seeking Out Adventure/Travel Opportunities	83	1.00	5.00	2.98	1.39
Financial Matters	83	1.00	5.00	2.89	1.39
Lifestyle Changes	83	1.00	5.00	2.37	1.17
Concern for the Safety and Security of Children	83	1.00	5.00	2.09	.91
Family Matters	83	1.00	5.00	1.40	.76
Motivation (Overall)	83	1.00	4.06	2.49	.63

A detailed description of the results of the statistical analysis of the questionnaire using descriptive statistics is provided for each of the components of the Motivation to Expatriate sub-scale.

7.6.1.1 Career Matters

The mean score of (m=3.43) shows that Career Matters have had a moderate influence as a reason for expatriate academics in the sample to decide to relocate. The standard deviation (sd.= 1.06) shows a wide variation from the mean. Some respondents believe that career advancement had no influence on their decision to relocate (min=1.00), while others believed that it has had a significant influence (max=5.00). The five-point scale uses (1) to indicate 'No Influence' and (5) to indicate a 'Highly Significant Influence'.

Figure 7.9 illustrates the items comprising Career Matters as a reason to relocate. The mean values indicate the respondents' perception of these aspects as influential in their decision to relocate. The mean values of the items comprising this component are listed below in descending order:

- B21 Pursuit of Meaningful Work (mean= 4.01, sd.= 1.12)
- B20 Career Advancement (mean=3.79,sd=1.38)
- B32 Acquisition of New Knowledge (mean=3.7,sd.=1.40)
- B30 Personal Growth (mean=3.53, sd=1.37)
- B22 Overcoming Career Plateauing (mean=2.87,sd=1.43)
- B29 Self-discovery (mean=2.7,sd=1.49).

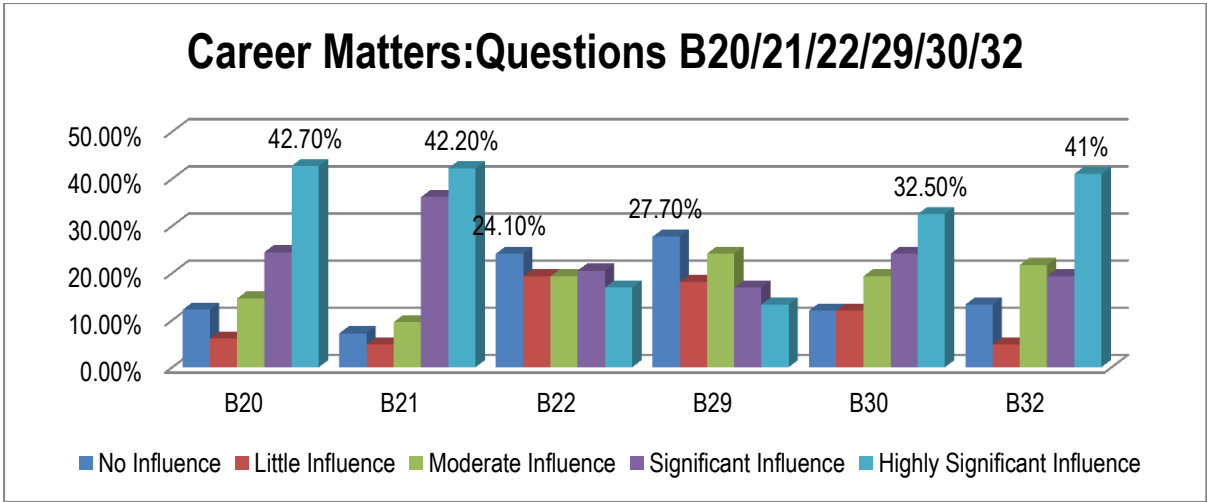


Figure 7-9 Frequency distribution of items on the Career Matters component

The highest mean score of 4.01 was obtained for the item Pursuit of Meaningful Work (42.2% highly significant influence, 36.1% significant influence), indicating that this reason played the most significant role in the decision of expatriate academics to relocate. The second highest mean score of 3.79 was obtained for the item Career Advancement (42.7% highly significant, 24.1% significant influence), indicating that this is a highly significant reason for expatriate academics to relocate. The third highest mean score of 3.7 was obtained for the item Acquisition of New Knowledge (41% highly significant, 21.7% moderate influence), indicating that this is a significant consideration in motivating expatriates to come to South Africa. The fourth highest mean score of 3.53 was for the item Personal Growth (maturing) of the respondents as adults and human beings, which was also seen as a reason to relocate (32.5% highly significant influence, 24.1% significant influence).

These results reveal that highest mean score for the Motivation to Expatriate sub-scale is for the Career matters component. This helps us to see that respondents value expatriation as a tool to assist their career advancement. It also reveals their perception of expatriation as a means to achieving an international career, something that is prized in the global marketplace and serves to enhance their employability.

7.6.1.2 Seeking Out Adventure and Travel Opportunities

The mean score (m=2.98) shows that Seeking Out Adventure and Travel Opportunities had a moderate influence on respondents decision to relocate. The standard deviation (sd=1.39) reveals a wide variation from the mean. Some respondents believed that Seeking Out Adventure and Travel Opportunities had no influence (min=1.00), while others believed that

Seeking Out Adventure and Travel Opportunities had a highly significant influence (max=5.00) over their decision to relocate.

Figure 7.10 below illustrates the respondents’ responses to seeking adventure or the opportunity to travel as their reason to relocate, using a five-point rating scale where (1) is No Influence and (5) is Highly Significant Influence. The mean score values in descending order are as follows:

- B13 Opportunity to see new places, meet new people and experience different cultures (mean=3.15, sd=1.40)
- B14 Challenge to self (mean=2.86, sd=1.44)

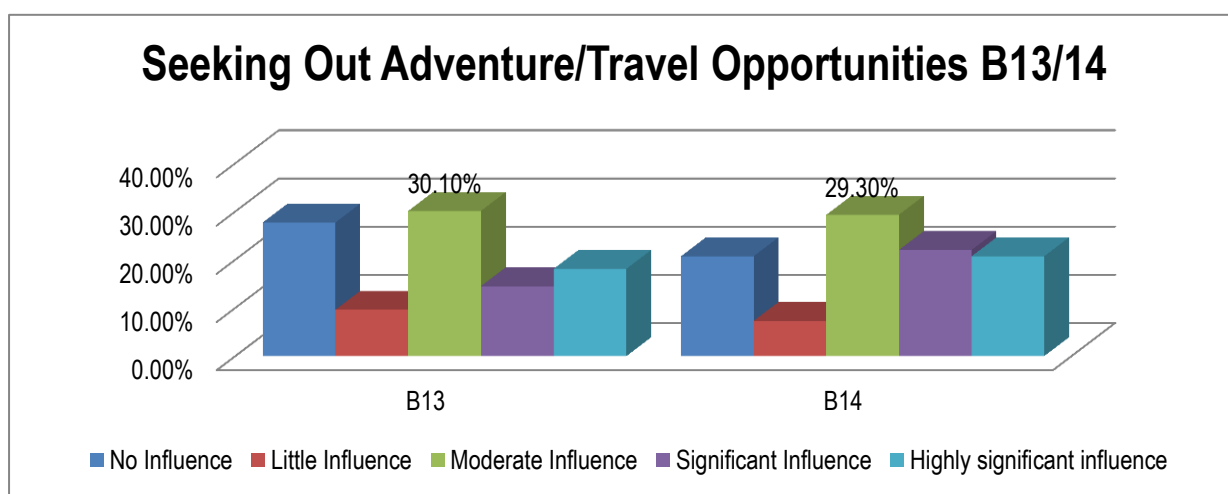


Figure 7-10 Frequency distribution of Seeking Out Adventure/Travel Opportunities component of Motivation to Expatriate sub-scale

The challenge to self, item deals with the concept of expatriation being a “hero’s adventure”, a concept introduced by Osland (1995:13) where respondents seeking out host countries where their experience becomes one of personal mastery and learning about ones’ own limitations. Figure 7.10 shows that the majority of respondents (30.1%) indicated that the item Challenge to Self had a moderate influence over their decision to relocate, while 27.7% indicated that this reason had no influence on their decision to relocate. Only 18.1 % of respondents indicated that Challenge to Self had a highly significant influence on their decision to expatriate.

For the item, Opportunity to see new places, meet new people and experience different cultures, the majority of respondents (29.3%) indicated that it had a moderate influence in their decision to expatriate. While, the item, Opportunity to see new places, meet new people and experience different cultures, 20.7% of respondents indicated that this statement had no

influence on their decision to relocate and 20.7% of respondents indicated that it had a highly significant influence on their decision to relocate.

Figure 7.10 illustrates the influence that seeking out adventure/travel opportunities has had on participants as a reason to relocate. The highest mean score of 3.15 was for the item, an Opportunity to see new places, meet new people and experience different cultures (29.3% moderate influence, 22% significant influence). The respondents who indicated that their motivation centered around expatriation being a personal challenge (Challenge to Self) had the lowest mean score of 2.86 (30.1% moderate influence, 27.7%, no influence). These mean scores suggest that respondents found that seeking out adventure and travel opportunities had a moderate influence over the decision to expatriate.

Results reveal the respondents' perception that going to a foreign country to work is an "hero's adventure" (Osland, 1995:13) or an opportunity to travel and see new places, meet new people and experience different cultures. Seeking out adventure and travel opportunities has the second highest mean score for the Motivation to expatriate sub-scale, which indicates that some respondents do view their decision to come to South Africa as an opportunity for adventure and travel.

7.6.1.3 Financial Reasons

The mean score of ($m=2.89$) shows that Financial Reasons had a small to moderate influence on the respondents' decision to relocate. The standard deviation ($sd= 1.39$) reveals a wide variation from the mean. Some subjects believe that Financial Reasons have had no influence ($min=1.00$) while others believed that Financial Reasons have had a highly significant influence ($max=5.00$) on their decision to relocate. This component examined the items that focused on a better salary and benefits as being a reason for academics in the sample to want to relocate South Africa and UKZN in particular. However, results indicate that these items have had a small to moderate influence on the respondents' decision to relocate. This would indicate that Financial Reasons have had little to do with respondents' decisions to relocate to South Africa and work at this university.

Figure 7.11 illustrates the responses of respondents regarding the importance of financial considerations on their decision to relocate. The mean values are presented in descending order:

- B18 Better Benefits ($mean=2.82$, $sd.=1.32$)

- B19 Better Salary (mean=2.79, sd.=1.31)

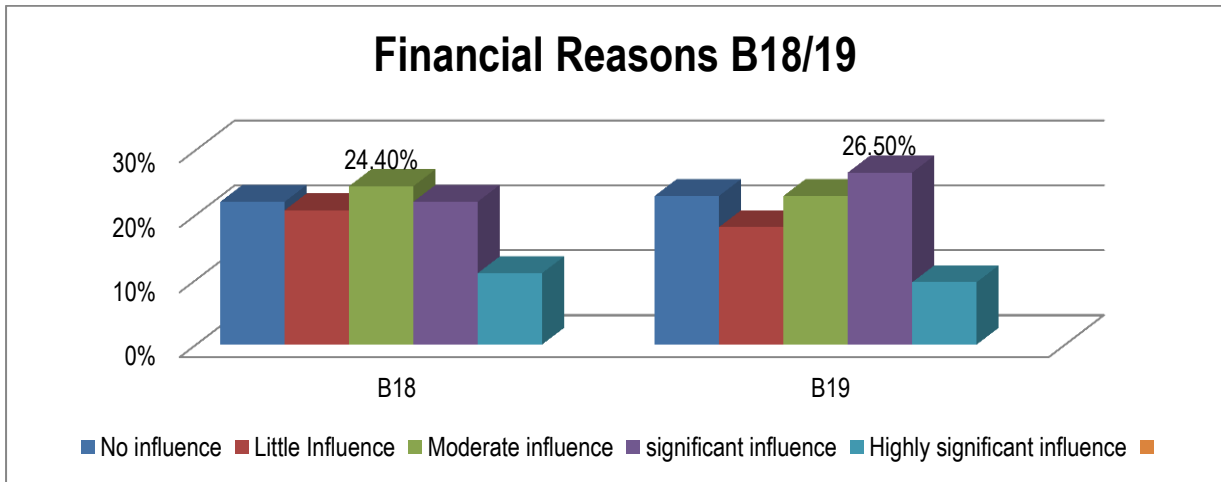


Figure 7-11 Frequency distribution of the Financial Reasons component of the Motivation to Expatriate sub-scale

With regards to the item, seeking a Better Salary as a reason to expatriate, the majority of respondents (24.4%) attached a moderate influence to this, while 22% indicated that it had no influence on their decision to relocate. With regard to the item, seeking out Better Benefits as a reason to relocate, the majority (26.5%) attached a significant influence to it, while 22.9% of respondents attached no influence to this item. The mean score of 2.82 indicates a moderate level of influence with regard to Better Benefits as a reason to expatriate. The mean score of 2.79 also indicates a moderate level of influence with regard to a Better Salary as a reason to expatriate. Thus it would seem that financial considerations have had a moderate influence when deciding to relocate to UKZN and South Africa.

7.6.1.4 Lifestyle Change

The mean score (m=2.37) shows that Lifestyle Change has had little influence on respondents' decision to expatriate. The standard deviation (sd.=1.17) reveals a wide variation from the mean. Some respondents believe that Lifestyle Change has had no influence (min=1.00) while others believed that it has had a highly significant influence (max=5.00) on their decision to relocate to UKZN and South Africa.

Figure 7.12 presents the items that comprise the Lifestyle Change component of the Motivation to Expatriate sub-scale. The mean and standard deviation scores of the responses are presented in descending order:

- B15 Reinventing Oneself (mean=2.64, sd.=1.55)
- B16 Searching for One's Life Purpose (mean=2.63, sd.=1.68)

- B17 Boredom with Old Routine (mean=2.17, sd.= 1.45)
- B18 Dealing with Personal Problems (mean=1.65, sd. =1.18)

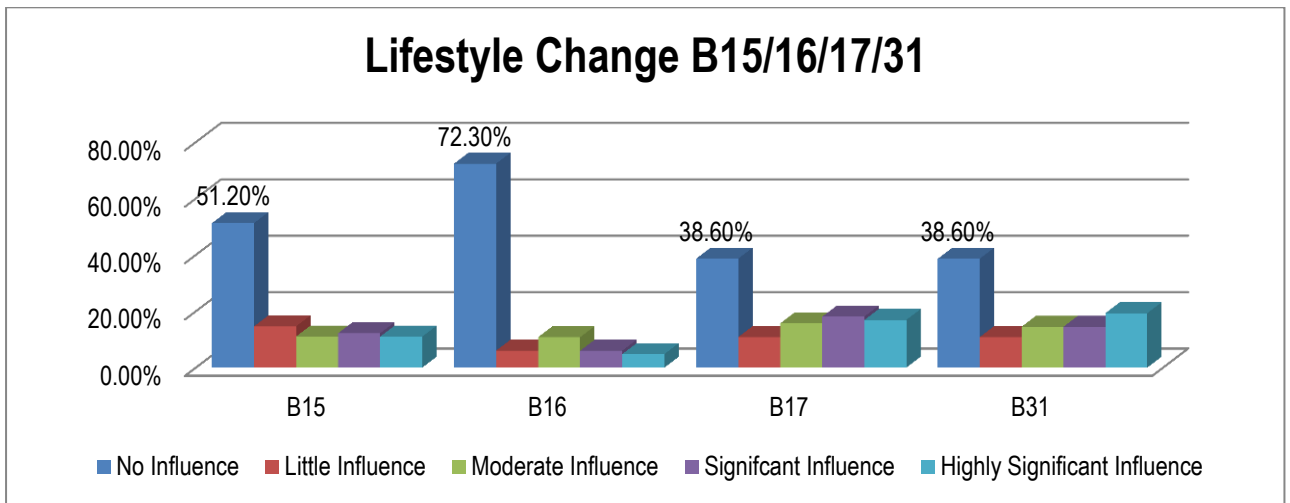


Figure 7-12 Frequency distribution of items of the Lifestyle Change component of Motivation to Expatriate sub-scale

Figure 7.12 illustrates that the majority of the respondents (38.6%) indicated that Reinventing Oneself has had no influence on their motivation to expatriate, while for 18.1% of respondents this statement had significant influence. The majority of respondents (38.6%) indicated that Searching for One’s Life Purpose has had no influence on their motivation to expatriate, while 19.3% indicated that this statement has had a highly significant influence on their motivation to expatriate. 51.2 % of respondents attached no influence to the statement Boredom with Old Routine as a motivation to want to expatriate. Only 11% attached a high level of influence to this statement. The majority of respondents (72.3%) indicated that Dealing with Personal Problems has had no influence on their motivation to expatriate, while only 4.8% indicated that it has had a highly significant influence on their motivation to expatriate.

The highest mean score of 2.64 for the item, Reinventing Oneself (38.6% no influence, significant influence 18.1%) suggests that the respondents attach little importance to the concept of reinventing oneself by expatriating. The second highest mean score is 2.63 for the item, Searching for One’s Life Purpose, suggesting that respondents decided to expatriate as this allowed them to search for their true purpose in life (38.6% no influence, 19.3% highly significant influence). This score once again shows that the responses demonstrate a moderate level of influence. The lowest mean score of 1.65 for the item, Dealing with Personal Problems (72.3% no influence, 6% little influence) suggests that respondents did not attach a great deal of importance to this as a reason for their relocation. These mean scores

therefore suggest that respondents attached little importance to Lifestyle Change as a reason for their decision to expatriate to South Africa.

7.6.1.5 Concerns for Safety and Security of Children

The mean score of (m=2.09) shows that Concerns for Safety and Security of Children had little influence on the respondents' decision to relocate to South Africa. The standard deviation (sd.= 0.91) shows a variation from the mean. Some respondents believe that Concerns for Safety and Security of Children had no influence (min=1.00) while others believed that it had a significant influence (max.=5.00).

Figure 7.13 below illustrates items of component, Concerns for Safety and Security of Children as a reason to relocate to UKZN and South Africa. The mean values are presented in descending order:

- B26 Quality of Life (mean=2.81, sd.=1.19)
- B27 Better Education for Children (mean=2, sd.=1,34)
- B28 Concerns for Safety and Security of Children (mean=1.49, sd.=0.98)

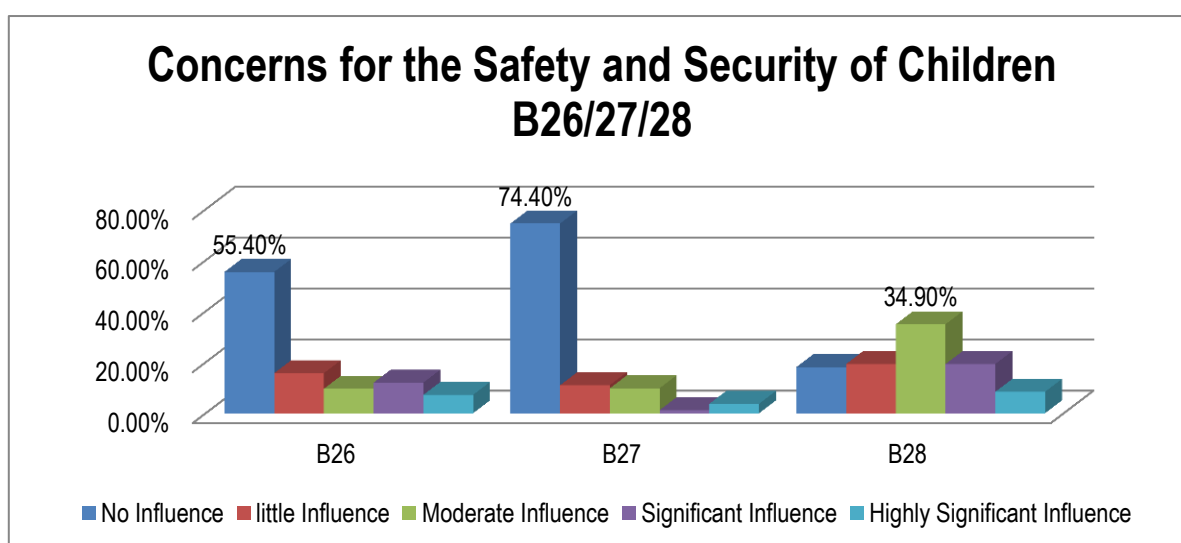


Figure 7-13 Frequency distribution for items on the component Concern for Safety and Security of Children on the Motivation to Expatriate sub-scale

The highest mean score (2.81) was for the items of Quality of Life (34.9% moderate influence, 19.3% little influence, 19.3% significant influence). This indicates that respondents found this item of moderate influence in their decision to relocate. Respondents found the item, a Better Education for Children (mean=2, 55.4% no influence, 15.7% little influence) to have no influence on their reason to relocate to UKZN and South Africa. The

item, Safety and Security of Children as a reason to relocate to South Africa had the lowest mean score (1.49) and responses to this item illustrate that it had little influence on their decision to expatriate (74.4% no influence, 34.9% moderate influence).

This component examined items that dealt with matters that would concern parents of children, for example, seeking a better education for children, having concerns about safety and security of children in their home country and trying to improve the quality of life the family enjoys. However, based on the results, this component and its items appear to have had little influence on the respondents' decision to expatriate. These results may be influenced by the fact that the majority of the sample is single. In any event, the majority of academics in the sample have been in the country for between seven and ten years and in those cases where those respondents have children, they are less than ten years old. Hence concern regarding the safety and security of children was not a reason to relocate for the majority of respondents.

7.6.1.6 Family Matters

This component was ranked the lowest in terms of mean scores of all the components of the Motivation to expatriate sub-scale, with a mean score of 1.41. The standard deviation (sd= 0.76) shows the variation from the mean. The items included in this component had no influence (min=1.00) for some academics in the sample, while others believed that it had had a significant influence (max.=5.00).

Figure 7.14 below illustrates the mean scores of the various items of family matters component that could be a reason to relocate to UKZN and South Africa. The mean values are presented in descending order:

- B23 Spouse/Partner Presented with a Job Opportunity in South Africa (mean=1.68, sd. =1.41)
- B24 Extended Family (mean=1.29, sd.=0.89)
- B25 Aging and Elderly Parents (mean=1.25, sd.=0.78)

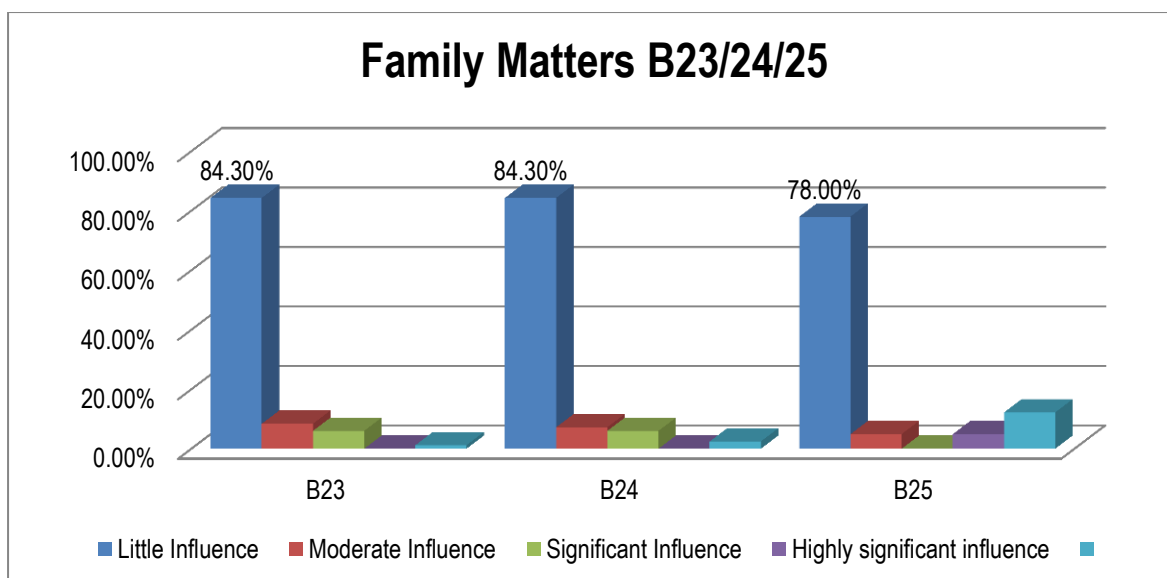


Figure 7-14 Frequency distribution of items of the Family Matters component of the Motivation to Expatriate sub-scale

The highest mean score (1.68) for the dimension of a spouse or partner being presented with a job opportunity in South Africa (the trailing spouse) indicates that this item had little influence on the respondents' decision to expatriate (78% no influence, 12.2% highly significant influence). The second highest mean score (1.29) was for the item that measured the degree to which the existence of extended family in South Africa played a role in the decision to expatriate to UKZN and South Africa (84.3% no influence, 7.2% little influence). This item had no influence on the respondents' decision to relocate. The item that had the lowest mean score of 1.25 was the influence that aging and elderly parents had on the respondents' decision to expatriate. This dimension had no influence (84.3% no influence, 8.4% little influence).

These results could also be attributed to the fact that the majority of respondents are single and those that are married with children have their extended families in their home country and as such maintain close ties with the family and friends back home.

The mean score of ($m=2.49$) shows that overall the sub-scale Motivation to expatriate has moderate influence. Standard deviation (Std. Dev.= 0.63) shows a wide variation of influence. These results illustrate that all the components of this sub-scale has a certain degree of influence on the respondents' in the sample. However, there was no one well-defined singular reason that expatriate academics in the sample had for relocating to UKZN and South Africa.

In the next section the results of the Expatriation Experience sub-scale is presented.

7.6.2 Objective 6: To investigate expatriate academics experiences of organisational and social support during expatriation at UKZN

The section below provides an overview the Measure of Central Tendency and Dispersion for each of the dimensions of the Expatriation Experience sub-scale. The results are indicated in Table 7.22 in descending order. Following this each component is discussed in turn.

Table 7-22 Measure of Central Tendency for the Expatriation Experience scale

	n	Minimum	Maximum	Mean	Std. Deviation
Family and Friends Support	83	1.00	6.75	5.01	1.13
School Support	83	1.80	7.00	4.80	1.24
Pre-departure Phase	83	1.00	7.00	4.25	1.62
University Community Support	83	1.00	7.00	4.15	1.36
Fulfillment of Workplace Expectations	83	1.00	7.00	3.81	1.50
Experience (Overall)	83	2.71	6.29	4.40	.90

7.6.2.1 Family and Friends Support

The mean score of (mean= 5.01) shows that respondents agree slightly on the role family and friends have played in their experience of expatriation. The standard deviation (sd.= 1.13) shows a wide variation from the mean. Some respondents indicated that they disagreed strongly (min=1.00), while others agreed (max=6.75).

Figure 7.15 below indicates the items that influenced the respondent's perception of their family and friends support during their expatriation experience. A seven-point rating scale was used with (1) being disagree strongly and (7) being agree strongly.

- B43 My family and I maintain close ties with family and friends back home (mean=6.83, sd=8.03)
- B42 My family and friends in my home country were supportive of my decision to expatriate to South Africa (mean=4.89, sd=1.91)
- B41 my spouse and children played an important role in my overall experience of expatriation (mean=4.87, sd=1.87)
- B44 My colleagues at my old institution in my previous country were supportive of my decision to expatriate to South Africa (mean=4.41, sd=1.73)

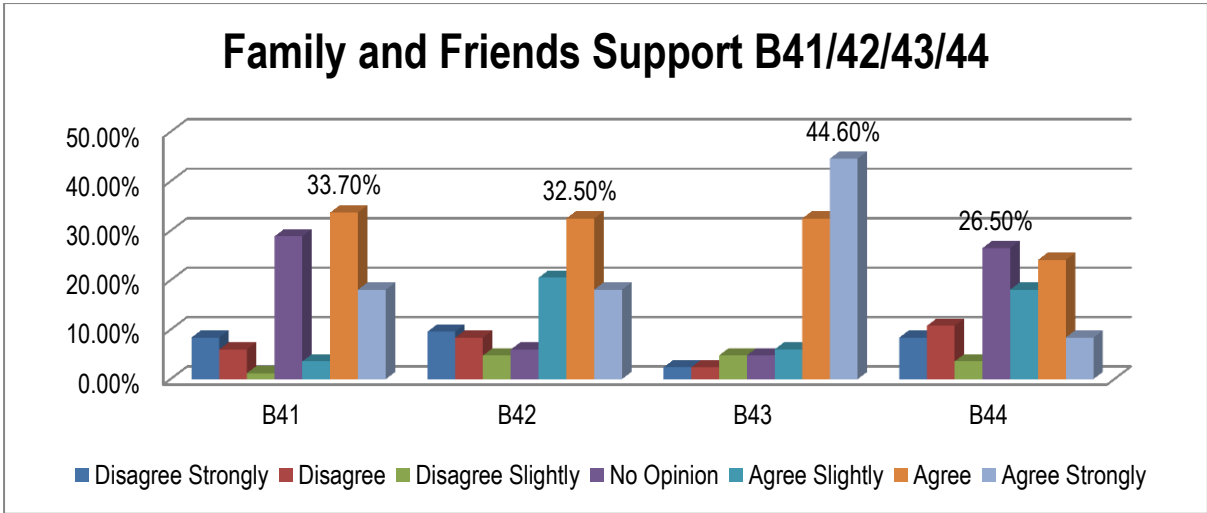


Figure 7-15 Frequency distribution of items on the Family and Friends Support component of the Expatriation Experience sub-scale

The highest mean score of 6.83 was obtained for the item that illustrate that respondents have the support of family and friends back home (32.5% agree, 44.6% agree strongly) during their expatriation experience. When asked whether their family and friends were supportive of the decision to expatriate to UKZN and South Africa, the majority of respondents agreed (32.5%), while some (18.1%) agreed strongly. The majority of respondents (33.7%) agreed that their spouse and children played an important role in their overall experience of expatriation, while others had no opinion (28.9%). This can be attributed to the fact that the majority of this sample of academics is single. The item relating to how supportive colleagues in their home country were of the decision to expatriate to UKZN and South Africa, the majority of respondents (26.5%) had no opinion, while 24.1% agreed that their colleagues were supportive. This seems to indicate a level of resentment and professional jealousy from colleagues left behind about the expatriation to South Africa.

Since this is scale data, three categories of responses were further identified to analyse the findings. The three categories are Negative, no opinion and positive. The negative scores comprise responses such as disagree strongly/disagree/disagree slightly. No opinion shows those who chose to remain neutral in their responses. Positive is comprised of responses agree strongly/agree/agree slightly. The figure below shows the scores for the respondents for their perceptions of family and friends support during their expatriation experience.

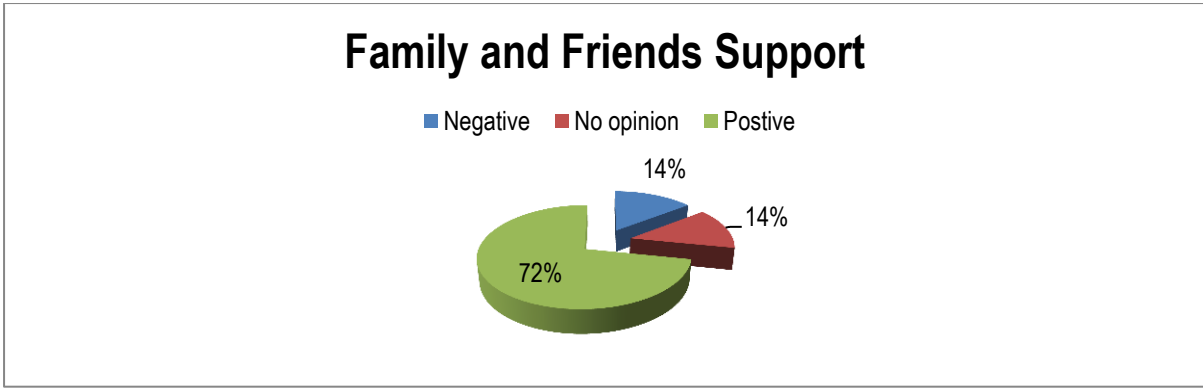


Figure 7-16 Perception of expatriate academics of family and friends support during the expatriation experience

Results shown in Figure 7.16 indicate that respondents in the study have a positive perception of the role that family and friends support has played in their overall experience of expatriation.

7.6.2.2 School Support

As mentioned earlier, the university structure now houses different disciplines in ‘schools’. Therefore, this component seeks to measure the level of support perceived by expatriate academics by their respective disciplines which are housed in ‘schools’. These ‘schools’ fit into the organisational structure of the university as part of the respective ‘Colleges’ that were previous called Faculties. The mean score of (m= 4.80) shows that respondent’s agree slightly regarding their perception of school support. The standard deviation (sd.=1.24) shows a wide variation. Some respondents disagree strongly (min=1.00) while others agree strongly (max=7.00). This component involved items that examined the respondents’ perception of the levels of support offered to them by the school in which they worked in the university, that is their work environment. So this component looked closely at the challenges and opportunities respondents faced in their working environment. Items dealing with the degree of collegiality in the school environment allude to the type of working environment the respondent perceived, whether it was mutually respectful or hostile and how they would describe the level of collegial support from other staff members. These items help to describe the type of relationships expatriate academics in the sample shared with fellow staff members, indicating whether they found fellow staff members friendly and approachable or distant and apathetic.

Items also examined the perceived levels of research and teaching support from the school. These two items represent the two major challenges that any academic faces in the university

environment of today. Access to research funding is a major issue that affects all academics as many of the research grants are available on a competitive basis. This could be a major obstacle to expatriate academics as many research grants are only available to South African academics. Also in terms of teaching, the South African higher education system presents unique challenges in terms of large class sizes, English spoken as a second or third language and students from previously disadvantaged backgrounds together with those from privileged backgrounds.

The other items in this component deal with the respondents' level of engagement with the school, that is, how much value they place on being part of the school, the level of intellectual stimulation they feel by being part of the school, how they feel about the time they spend at the school and whether or not it had a positive or negative impact on their career.

The Experience of School Support component in Figure 7.17 below highlights the items that influenced the respondents' perceptions of the level of school support they have experienced during expatriation, using a seven-point rating scale (disagree strongly to agree strongly). The mean score values are presented in descending order:

- B45 I receive excellent collegial support in this school (mean=5.02, sd.=1.70)
- B50 My school is a collegial place to work (mean= 4.8, sd.= 1.66)
- B51 My school has helped me pursue my research activities (mean=4.73, sd.= 1.69)
- B54 Working at this school is intellectually stimulating (mean=4.55, sd.=2.01)
- B55 My school has helped me with my teaching challenges (mean= 4.37, sd.=1.71).

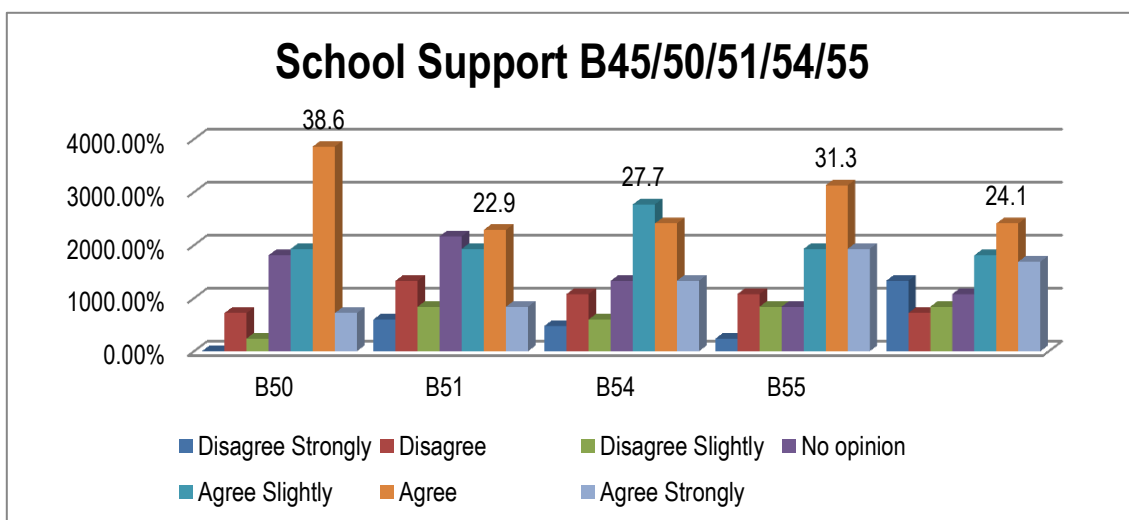


Figure 7-17 Frequency distribution for the items on the School Support component of the Expatriation Experience sub-scale

The mean score of 5.02 was obtained for the item dealing with the academics in the sample's experience of collegial support from the school (31.3% agree, 19.3% agree strongly). A mean score of 4.8 was obtained for the item dealing with the academics in the sample's experience of the school being a collegial place to work (38.6% agree, 19.3% agree slightly). A mean score of 4.73 was obtained for the item that examined the respondents' experience of school support when it came to their research activities (27.7% agree slightly, 24.1% agree). A mean score of 4.55 was obtained for the item examining whether the respondents found their experience of working at their school intellectually stimulating (24.1% agree, 18% agree slightly). The lowest mean score of 4.37 was obtained for the item examining the expatriate academics in the sample's experiences with the school helping with the challenges associated with teaching (22.9% agree, 19.3 agree slightly).

Since this is scale data, three categories of responses (negative, no opinion and positive) were further identified to analyse the findings as described in 7.6.2.2. Figure 7.18 below shows the scores for the respondents' perception of the support their school has shown them during their expatriation experience. The results indicate that respondents have a positive perception of the support their schools have offered them during expatriation, with the responses ranging from agree strongly to agree slightly.

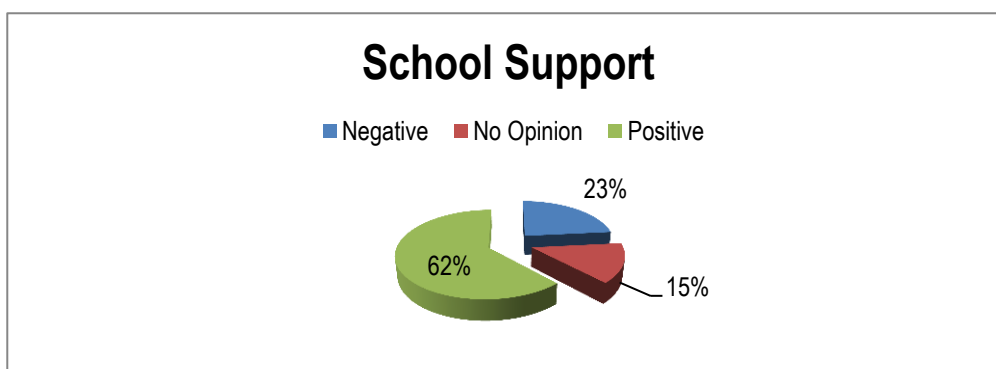


Figure 7-18 Perception of expatriate academics regarding school support during the expatriation experience

Results illustrate that the overall perception of expatriate academics in this sample regarding the support their school has shown them during their career experience is positive (62%).

7.6.2.3 Pre-departure Phase Experience

The mean score of ($m=4.25$) shows that respondents have no opinion regarding their pre-departure phase experience. The standard deviation ($sd= 1.62$) shows a wide variation from

the mean. Some respondents disagree strongly (min=1.00) while others agree strongly (max=7.00). One of the items here is deals with the expatriate academics expectations of their living conditions being based on realistic previews. Most respondents tended to agree with this item. For the item that focused on the support offered by the university during the pre-departure phase also known as the ‘on-boarding’ phase of expatriation, the majority of respondents tended to disagree strongly with this item.

The Pre-departure Phase Experience scale in Figure 7.19 below highlights the components that influenced the subject’s perception of the pre-departure phase of their expatriation experience, using a seven-point rating scale with (1) being disagree strongly and (7) being agree strongly and the mean score values in descending order.

- B35 My expectations regarding living conditions based on realistic living previews (Mean=4.58,SD=1.76)
- B37 The university offered my family and I a high level of support during this time (Mean=3.93, sd=2.13).

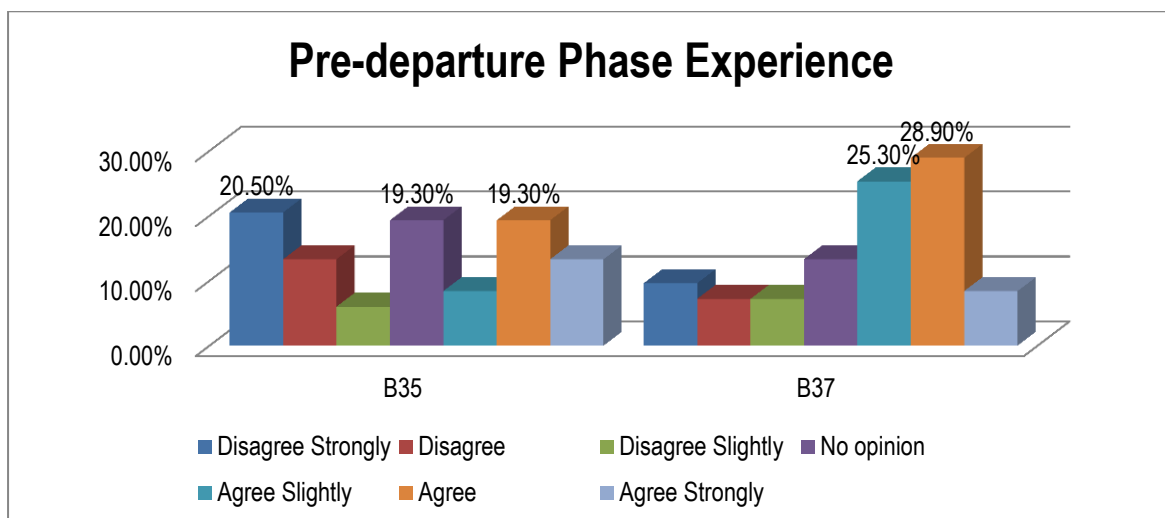


Figure 7-19 Frequency distribution for the items on the Pre-departure Phase component of the Expatriation Experience sub-scale

For the item dealing with realistic previews of the living conditions in South Africa, the majority of respondents (28.9%) indicated that they agreed that they had a good idea of what to expect when settling down in South Africa. Other respondents (25.3%) agreed slightly that they had a fairly good idea of what to expect in South Africa. Respondents indicated that they strongly disagree (20.5%) with the proposition that there was a high level of support

from the university. Some respondents had no opinion (19.3%) regarding the level of support offered by the university during pre-departure phase.

The figure below shows the scores for the respondents for their perception of their Pre-departure phase experience, that is, what in HR is called the ‘on-boarding phase’. This is the time prior to their arrival to take up the post.

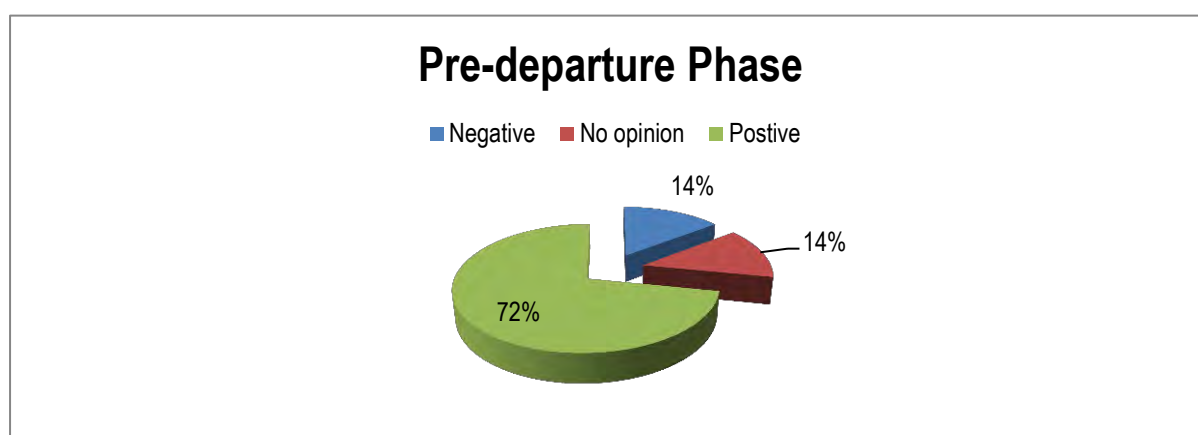


Figure 7-20 Perception of expatriate academics regarding their pre-departure phase experience

From the results above, it is clear that the majority of respondents felt that their pre-departure experience was a positive one (72%).

7.6.2.4 University Community Support

The mean score of (m=4.25) shows that respondents have no opinion regarding the social support component. The standard deviation (sd.=1.36) shows a wide variation in responses. Some respondents disagree strongly (min=1.00) while others agree strongly (max=7.00).

The social support scale in Figure 7.21 highlights the components that influenced the respondents’ perception of the support offered by other expatriates in the university community during their expatriation experience, using a seven-point rating scale where (1) is disagree strongly and (7) is agree strongly. The mean score values are presented in descending order:

- B47 Other expatriates in the university community have expressed an interest in networking with me (mean=4.39, sd.=1.89)
- B48 Other expatriates in the community where I live have expressed an interest in establishing contact with me (mean=4.24, sd.=1.74)

- B49 On taking up the new position the university offered support to my family e.g. accommodation, employment, schools, etc. (mean= 3.83, sd=1.79)

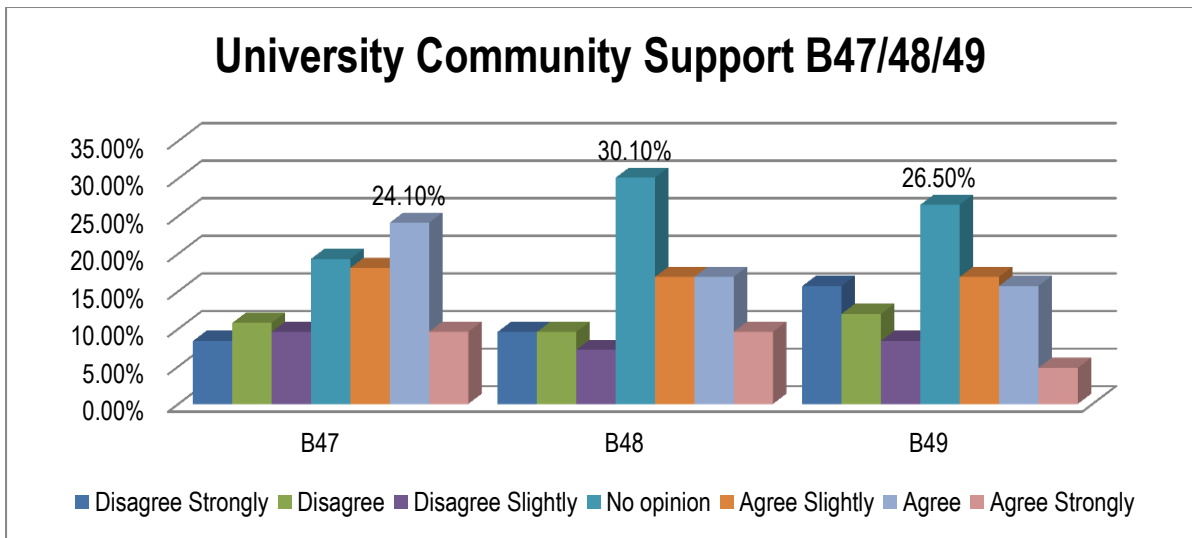


Figure 7-21 Frequency distribution of items on the University Community Support component on the Expatriation Experience sub-scale

A mean score of 4.39 was obtained for the item that dealt with expatriates in the university community expressing an interest in networking with the expatriate academics in the sample (24.1% agree, 19.3% no opinion). A mean score of 4.24 was obtained for the item that examines whether expatriates in the community where the respondent lived have expressed an interest in establishing contact with them (30.1% no opinion, 16.9% agree). The item focusing on the support the university had provided to the expatriate academics in the sample had a mean score of 3.83, with 26.5% of the respondents having no opinion and 16.5% agreeing slightly.

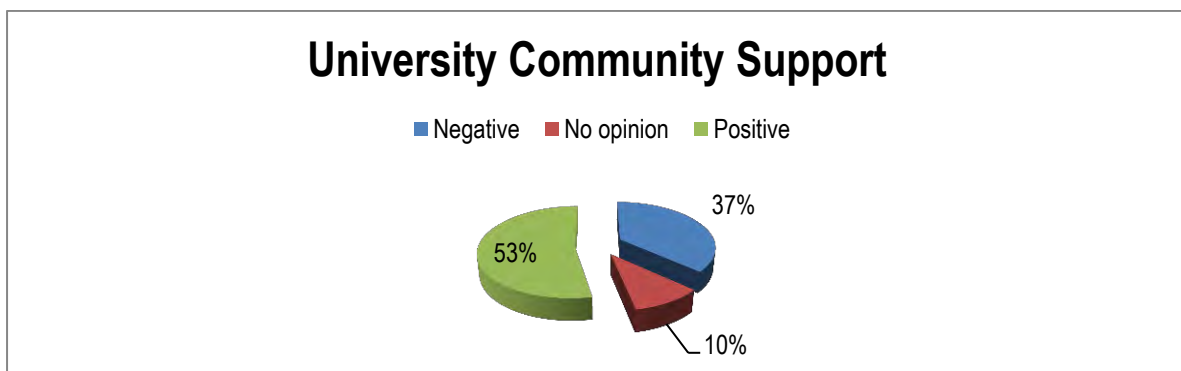


Figure 7-22 Perceptions of expatriate academics regarding University Community Support in the Expatriation Experience sub-scale

These results illustrate that there is a lack of a clear opinion (either positive or negative) amongst expatriate academics in the sample regarding the support received from other expatriates, either in the university community or society at large. 53% of the sample perceive the support from other expatriates as being positive. If one were to add those with no clear opinion (10%) and those with a negative opinion (37%) this result would indicate that expatriate academics in the sample with an opinion leaning towards the negative would total 57%. This result indicates that expatriate academics in the sample have deliberately chosen not to express their opinions strongly on this component of the expatriation experience sub-scale. The possible reasons for this are further explored in Phase 1 and 3 of the study.

7.6.2.5 Fulfillment of Workplace Expectations

The mean score of (m=3.81) shows that respondents disagree slightly, bordering on having no opinion regarding the Fulfillment of Workplace Expectations. The standard deviation (sd.=1.49762) shows a great variation from the mean. Some respondents disagree strongly (min=1.00) while others agree strongly (max=7.00).

The Fulfillment of Workplace Expectations component in Figure 7.23 below highlights the items that made up this component, using a seven-point rating scale where (1) is disagree strongly and (7) is agree strongly.

- B38 Expectations of work situation are not met (mean=3.63, sd.=1.904)
- B40 Expectations of work situation have been exceeded (mean=3.24, sd.=1.664).

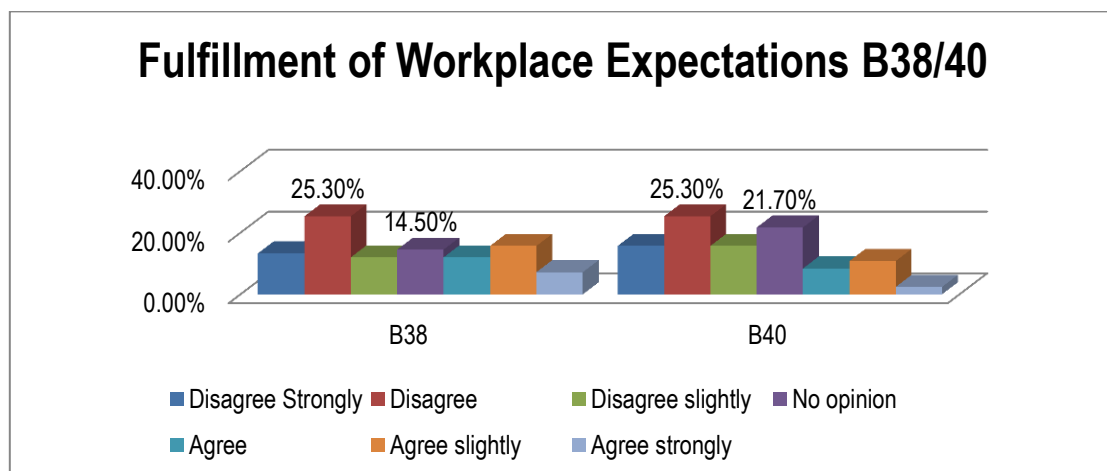


Figure 7-23 Fulfillment of Workplace Expectations

The highest mean score of 3.63 was obtained for the item that evaluated the expectations of respondents regarding their working conditions and whether these expectations were met or not (25.3% disagree, 15.7% agree). A mean score of 3.24 was obtained for the item that evaluated the expectations of respondents regarding their working conditions and whether these expectations were exceeded (25.3% disagreed, 21.7% no opinion).

These results indicate that the respondents tended to disagree to a certain degree that these factors played an important role in their overall expatriation experience. When SIEs decide to expatriate they have certain expectations regarding their work situation. These results show that respondents border on the negative in terms of their responses to these items. This also indicates once again the unwillingness of the subjects to be open and honest regarding the fulfillment of their expectations regarding their work situation and living conditions in South Africa.

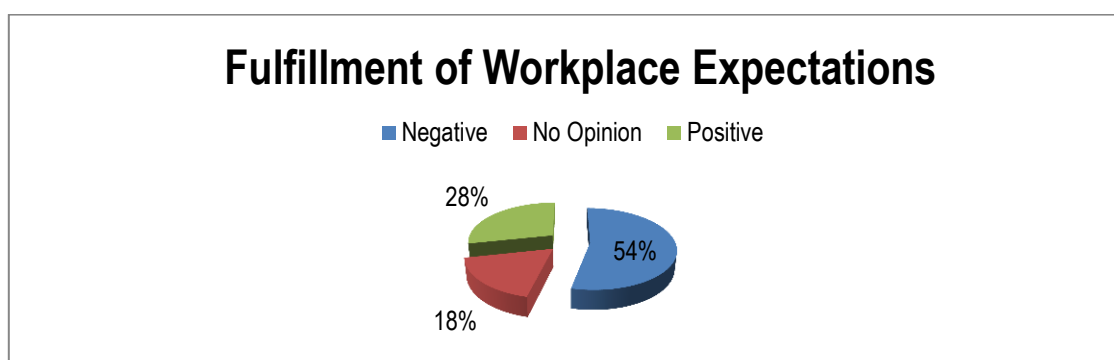


Figure 7-24 Perceptions of expatriate academics regarding the fulfillment of their workplace expectations

Since this is scale data, three categories of responses (Negative, No Opinion and Positive) were further identified to analyse the findings. In Figure 7.24 above, the majority of respondents expressed a negative opinion (54%) regarding the fulfillment of their workplace expectations; this suggests that their experience at UKZN had not met their expectations regarding workplace conditions.

7.7 Results of findings using inferential statistics

Inferential statistics were used to test if demographic factors such as age, gender, marital status, number of dependents, location of family, duration of international career experience in South Africa and field of study have an influence on the respondents' replies on the

various components of the Motivation to Expatriate sub-scale, the Expatriation Experience sub-scale of the self-designed questionnaire “The Career Experiences of Expatriate Academics at UKZN”. The T-test and Analysis of Variance (ANOVA) were used to explore Aim 2, Objectives 8 and 9 of this study:

8. To investigate whether the following demographic factors, age, gender, marital status, number of dependents, location of expatriates family, years of experience as an academic, duration of expatriation experience and field of study influence expatriate academics motivation to expatriate, international career experience and career orientation at UKZN.

9. To explore whether there is a relationship between the expatriate academics motivation to expatriate and their international career experience, their motivation to expatriate and their career orientation and between their international career experience and their career orientation at UKZN.

Firstly, the results for objective 8 for the Motivation to expatriate sub-scale and the Expatriation experience sub-scale are presented. This is followed by the results for Objective 9 for the Motivation to expatriate sub-scale and the Expatriation experience sub-scale.

7.7.1 To investigate whether age influences expatriate academics motivation to expatriate and their international career experience

The results of the statistical analysis using inferential statistics for Objective 8 are presented below.

7.7.1.1 Age and Motivation to Expatriate

The results of the ANOVA analysis show no statistically significant differences in the perceptions of Seeking Out Adventure/Travel Opportunities ($F = 2.08$; $p > 0.05$), Lifestyle Changes ($F = 2.08$; $p > 0.05$), Financial Reasons ($F = 1.67$; $p > 0.05$), Career Matters ($F = 2.38$; $p > 0.05$), Concern for the Safety and Security of Children ($F = .83$; $p > 0.05$) and Family Matters ($F=.49$; $p > 0.05$) were found as indicated in Table 7.23 below. However, the overall score for the Motivation to Expatriate sub-scale was found to be statistically significant ($F=2.75$; $p > 0.05$). These results illustrate that overall, all the components on the Motivation to Expatriate sub-scale played a moderate role the decision to relocate amongst expatriate academics in the sample.

Table 7-23 ANOVA: Items of the Motivation to Expatriate sub-scale and categories of Age

ANOVA			
		<i>F</i>	<i>p</i>
Seeking Adventure and Travel	Between Groups	2.08	.092
Lifestyle Changes	Between Groups	2.08	.091
Financial Reasons	Between Groups	1.67	.165
Career Matters	Between Groups	2.38	.059
Concern for Safety and Security of Children	Between Groups	.83	.511
Family Matters	Between Groups	.49	.745
Motivation (overall)	Between Groups	2.75	.034*

7.7.1.2 Age and Expatriation Experience

The results of the ANOVA analysis reveal that there were no statistically significant differences found concerning the perceptions of support of expatriate academics in the sample, during the Pre-departure Phase Experience ($F = 2.43$; $p > 0.05$), Fulfillment of Workplace Expectations ($F = 1.05$; $p > 0.05$), School Support ($F = .98$; $p > 0.05$) and Support from Other Expatriates ($F = 1.79$; $p > 0.05$) as seen in Table 7.24 below.

Table 7-24 ANOVA: Items of Expatriation Experience sub-scale between Age groups

ANOVA			
		<i>F</i>	<i>p</i>
Pre-departure Phase	Between Groups	2.43	.055
Fulfillment of Workplace Expectations	Between Groups	1.05	.387
Family and Friends	Between Groups	4.78	.002*
School Support	Between Groups	.98	.425
University Community Support	Between Groups	1.79	.139
Expatriation Experience (overall)	Between Groups	2.67	.038*

There is however, a statistically significant differences in the perceptions of support of expatriate academics in the sample, from Family and Friends ($F = 4.78$; $p < 0.05$) as well as the overall Expatriation Experience sub-scale ($F=2.67$; $p > 0.05$).

There is a statistically significant difference in the perceptions of expatriate academics concerning the support received from Family and Friends. The results show that the perceptions of the 26-30 age group differed significantly from that of the 31-35, 36-40, 41-50 and 50+ groups. The 26-30 age group disagreed slightly ($m = 2.98$) that they received support from family and friends compared to the 31-35 group who agreed ($m = 5.83$) and the 36-40 group ($m = 5.23$), the 40-50 group ($m = 4.86$) and the 50+ group ($m = 4.85$), all of whom agreed slightly. The mean score of ($m=4.40$) for the expatriation experience sub-scale shows that respondents have no opinion overall. The standard deviation ($sd= 0.99$) shows variation in responses.

7.7.2 To investigate whether gender influences expatriate academics motivation to expatriate and their international career experience

The results of the statistical analysis using inferential statistics for the demographic variable, gender is presented below.

7.7.2.1 Motivation to Expatriate and Gender

The results of the T-test performed on the items of Motivation to Expatriate sub-scale, that is Seeking Adventure/Travel ($t=.41, p>0.05$), Lifestyle Changes ($t=.65, p>0.05$), Financial Reasons ($t=.28, p>0.05$), Career Matters ($t=.05, p>0.05$), Concern for the Safety and Security of Children ($t=.68, p>0.05$) and Family Matters ($t=.54, p>0.05$) reveal that there were no significant differences between the groups of gender at the 95% level ($p>0.05$) (see Table 7.25).

Table 7-25 T-test for items of Motivation to Expatriate sub-scale between Gender groups

Independent Samples Test			
	Equal variances assumed		
	t-test for Equality of Means		
	<i>t</i>	<i>df</i>	<i>p</i>
Seeking Adventure/Travel	-.41	80	.681
Lifestyle Changes	.65	80	.518
Financial Reasons	-.28	80	.861
Career Matters	-.05	80	.958
Concern for the Safety and Security of Children	-.68	80	.497
Family Matters	-.54	80	.590
Motivation	-.30	80	.765

7.7.2.2 Expatriation Experience and Gender

The results of the T-test in Table 7.26 below show that there are no statistically significant differences in the perceptions of the components of the Expatriation Experience sub-scale, the Pre-Departure Phase ($t=1.05, p>0.05$), Fulfillment of Workplace Expectations ($t=.35, p>0.05$), Family and Friends Support ($t=.13, p>0.05$), School Support ($t=.39, p>0.05$), Support from other expatriates ($t=.95, p>0.05$) between the gender groups at the 95% ($p>0.05$) level of significance.

Table 7-26 T-test for items of the Expatriation Experience sub-scale between Gender groups

	Equal variances assumed		
	t-test for Equality of Means		
	<i>t</i>	<i>df</i>	<i>p</i>
Pre-departure Phase Experience	1.05	80	.298
Fulfillment of Workplace Expectations	.35	80	.731
Family and Friends Support	-.13	80	.894
School Support	-.39	80	.696
Support from Other Expatriates	.95	80	.345
Expatriation Experience	.64	80	.523

7.7.3 To investigate whether the marital status of expatriate academics influences their motivation to expatriate and international career experience

The results of the statistical analysis using inferential statistics for the demographic variable, marital status is presented below.

7.7.3.1 Motivation to Expatriate and Marital Status

A T-test was used here as the study only examined two categories concerning the marital status of respondents that is married and single. As indicated in Table 7.27, there are no differences between the marital status of subjects with regards to the Motivation to expatriate components (Adventure/Travel $t=.31, p>0.05$), Life Change ($t=.32, p>0.05$), Financial ($t=.77, p>0.05$), Career ($t=1.29, p>0.05$), Concern for Children ($t=1.27, p>0.05$) and Family ($1.53, p>0.05$) at the 95% level ($p>0.05$). Therefore this means that marital status is not a significant indicator of differences between the components of the Motivation to expatriate sub-scale tested here.

Table 7-27 T-test of dimensions of Motivation to Expatriate between Marital Status categories

Independent Samples Test			
	Equal variances assumed		
	t-test for Equality of Means		
	<i>t</i>	<i>df</i>	<i>P</i>
Adventure or Travel	.31	81	.759
Lifestyle Change	.32	81	.748
Financial Reasons	-.77	81	.443
Career Matters	-1.29	81	.239
Concern for Safety and Security of Children	1.27	81	.210
Family Matters	1.53	81	.130
Motivation (overall)	.210	81	.834

7.7.3.2 The Expatriation Experience and Marital Status

As indicated in Table 7.28 below, the components of the Expatriation Experience sub-scale (Pre-departure Phase Experience ($t=1.49, p>0.05$), Fulfillment of Workplace Expectations

($t=1.06$, $p>0.05$), Family and Friends Support (.73, $p>0.05$), School Support ($t=.85$, $p>0.05$), Support from Other Expatriates (.52, $p>0.05$) are not significantly different between the marital status categories at the 95% level ($p>.0.05$).

Table 7-28 T-test for components of Expatriation Experience between Marital Status categories

	Equal variances assumed		
	t-test for Equality of Means		
	<i>t</i>	<i>df</i>	<i>p</i>
Pre-departure Phase	-1.49	81	.140
Fulfillment of Workplace Expectations	1.06	81	.294
Family and Friends Support	-.73	81	.465
School Support	.85	81	.397
University Community Support	-.52	81	.608
Expatriation Experience	-.29	81	.772

7.7.4 To investigate whether the numbers of dependents expatriate academics have influences their motivation to expatriate and international career experience

The results of the statistical analysis using inferential statistics for the demographic variable, number of dependents is presented below.

7.7.4.1 Motivation to Expatriate and the Number of Dependents

As indicated in Table 7.29, there are no differences between categories of number of dependents with regards to the Motivation to Expatriate components, Seeking Adventure/Travel ($f=.62$, $p>0.05$), Lifestyle Changes ($f=.44$, $p>0.05$), Financial Reasons (2.17, $p>0.05$), Career Matters ($f=1.13$, $p>0.05$), Concern for Safety and Security of Children ($f=1.70$, $p>0.05$) and Family Matters (.59, $p>0.05$) at the 95% level ($p>0.05$). Therefore these results indicate that the number of dependents respondents have, has no significant influence on their decision to expatriate to UKZN and South Africa.

Table 7-29 ANOVA: Components of the Motivation to Expatriate scale and categories of the Number of Dependents

ANOVA			
		F	p
Adventure or Travel	Between Groups	.62	.694
Life change	Between Groups	.44	.822
Financial	Between Groups	2.17	.066
Career	Between Groups	1.13	.354
Concern for Children	Between Groups	1.70	.144
Family	Between Groups	.59	.705
Motivation	Between Groups	1.64	.160

7.7.4.2 Expatriation Experience and the Number of Dependents

As indicated in Table 7.30 below, there are no differences between categories of number of dependents with regards to the Experience of Expatriation components, that is, the Pre-departure Phase ($f=.78, p > 0.05$), Fulfillment of Workplace Expectations ($f=.34, p > 0.05$), Family and Friends Support ($f=.96, p > 0.05$), School Support ($f=1.13, p > 0.05$) and Support of Expatriate ($f=1.14, p > 0.05$) at the 95% level ($p > 0.05$). This suggests that the number of dependents respondents have did not have a significant influence during their international career experience. This is contrary to the results the researcher expected to acquire.

Table 7-30 ANOVA: Components of Expatriation Experience and the categories of Number of Dependents

ANOVA			
		F	P
Pre-departure Phase	Between Groups	.78	.565
Fulfillment of Expectations	Between Groups	.34	.888
Family and Friends	Between Groups	.96	.450
School Support	Between Groups	1.33	.260
University Community Support	Between Groups	1.14	.347
Experience	Between Groups	.26	.935

7.7.5 To investigate whether the location of the expatriate academics family influences their motivation to expatriate and international career experience

The results of the statistical analysis using inferential statistics for the demographic variable, the location of the expatriate academics family is presented below.

7.7.5.1 Motivation to Expatriate and the Location of the Expatriate's Family

The independent samples T-test results in Table 7.31, for the components of the Motivation to Expatriate and Location of Expatriate's Family indicate that there are no significant difference in the components of Seeking Adventure/Travel ($t=.48, p > 0.05$), Lifestyle Change ($t=.14, p > 0.05$), Career Matters ($t=.20, p > 0.05$), Concern for Safety and Security of Children

($t=1.30, p > 0.05$), Family Matters ($t=1.05, p > 0.05$). A statistically significant difference was found for the Financial reasons component at the 95% level ($t=2.13, p > 0.05$).

Therefore the results for Financial Reasons are discussed separately below.

Table 7-31 T-test for components of the Motivation to Expatriate sub-scale and the Location of the Expatriate's Family

	Equal variances assumed		
	t-test for Equality of Means		
	<i>t</i>	<i>df</i>	<i>p</i>
Seeking Adventure/Travel	.48	80	.631
Lifestyle Change	.14	80	.892
Financial Matters	2.13	80	.036*
Career Matters	-.20	80	.845
Concern for Safety and Security of Children	1.30	80	.196
Family matters	1.05	80	.234
Experience	.89	80	.376

For the component Financial matters, there is a higher mean score for those expatriates whose families are residing in South Africa (mean=2.97) than those whose families are not in South Africa (mean=2.30). These results illustrate that the financial incentives of expatriation (better salaries and benefits) are important to those in the sample who are mainly from SADC countries with families as it is seen as an opportunity to help alleviate any financial issues the family may have.

7.7.5.2 *Expatriation Experience and Location of Expatriate's Family*

The independent samples T-test (see Table 7.32) for where the expatriate's family is located and components of Expatriation experience sub-scale, that is, Pre-departure Phase Experience ($t=.54, p>0.05$), Fulfillment of Workplace Expectations ($t=.98, p>0.05$), Family and Friends Support ($t=.80, p>0.05$), School Support ($t=.23, p>0.05$), University Community Support ($t=.73, p>0.05$), indicate no significant differences at the 95% level ($p>0.05$). These results indicate that whether the families of expatriate academics are residing here in South Africa or in their home country has no significant effect on the expatriate academics in this sample, experience of expatriation.

Table 7-32 T-test: Components of Expatriation Experience sub-scale between groups of Location of Expatriate's Family

	Equal variances assumed		
	t-test for Equality of Means		
	<i>t</i>	<i>df</i>	<i>p</i>
Pre-departure Phase	.54	80	.589
Fulfillment of Expectations	.98	80	.332
Family and Friends	.80	80	.428
School Support	-.23	80	.822
University Community Support	.73	80	.470
Experience	.89	80	.376

7.7.6 To investigate whether the number of years of experiences as an academic influences their motivation to expatriate and international career experience

The results of the statistical analysis using inferential statistics for the demographic variable, the number of years of experience as an academic is presented below.

7.7.6.1 Motivation to Expatriate and Years of Experience as an Academic

Using an ANOVA test, as indicated in Table 7.33, the following components of the Motivation to Expatriate sub-scale were found not to be statistically significant: Seeking Adventure/Travel ($f=.76, p>0.05$), Lifestyle Changes ($f=.93, p>0.05$), Financial Reasons ($f=.68, p>0.05$), Concern for Safety and Security of Children ($f=1.43, p>0.05$) and Family Matters ($f=.63, p>0.05$). The component Career Matters is significantly different between the categories of the number of years of experience as an academic at the 95% level, ($f=3.88, p>0.05$). These results for Career Matters are presented below.

Table 7-33 ANOVA for components of Motivation to Expatriate sub-scale and Years of Experience as an Academic

ANOVA		<i>F</i>	<i>p</i>
Adventure or Travel	Between Groups	.76	.520
Life Change	Between Groups	.93	.431
Financial	Between Groups	.68	.565
Career	Between Groups	3.88	.014*
Concern for Children	Between Groups	1.43	.239
Family	Between Groups	.63	.597
Motivation	Between Groups	.99	.401

The component of Career Matters has the highest mean for the category of academics in the sample with 1-5 years of experience (mean=4.00), second were those academics in the sample with 6-10 years of experience (mean=3.54), followed by those academics in the sample with 11-15 years of experience (mean=3.22) and finally those academics in the sample with 16+ years of experience (mean=2.99). These results show that the less

experienced the expatriate academic the more likely that they would consider expatriation as a way to further their career aspirations of promotion and research collaboration.

7.7.6.2 *Expatriation Experience and Years of Experience as an Academic*

The results of the ANOVA test, as indicated in Table 7.34, the components of the Expatriation Experience sub-scale, that is, the Pre-departure Phase Experience ($f=.47$, $p>0.05$), Fulfillment of Workplace Expectations ($f=.26$, $p>0.05$), Family and Friends Support ($f=.45$, $p>0.05$), School Support ($f=.31$, $p>0.05$) and Support from Other Expatriates ($f=1.57$, $p>0.05$), are not significantly different between the categories of years of experience as an academic at the 95% level ($p>0.05$).

Table 7-34 ANOVA for components of Expatriation Experience sub-scale and Years of Experience as an Academic

ANOVA			
		<i>F</i>	<i>p</i>
Pre-departure Phase	Between Groups	.47	.777
Fulfillment of Expectations	Between Groups	.26	.853
Family and Friends	Between Groups	.45	.722
School Support	Between Groups	.31	.817
University Community Support	Between Groups	1.57	.230
Experience (Overall)	Between Groups	.23	.873

7.7.7 *To investigate whether the duration of the international career experience in South Africa influences their motivation to expatriate and international career experience*

The results of the statistical analysis using inferential statistics for the demographic variable, the duration of the international career experience in South Africa is presented below.

7.7.7.1 *Motivation to Expatriate and the Duration of International Career Experience in South Africa*

The results of the ANOVA analysis in Table 7.35 show that there is no significant difference in the perceptions of the components of the Motivation to Expatriate sub-scale, Seeking Adventure/Travel ($f=.86$, $p>0.05$), Lifestyle Changes ($f=.47$, $p>0.05$), Financial Reasons ($f=.48$, $p>0.05$), Career Matters ($f=.36$, $p>0.05$), Concern for Safety and Security of Children ($f=.32$, $p>0.05$) and Family Matters ($f=.33$, $p>0.05$) between the groups of the duration of the international career experience in South Africa at the 95% level ($p<0.05$).

Table 7-35 ANOVA: Components of Motivation to Expatriate sub-scale and categories of the Duration of the International Career Experience in South Africa

ANOVA			
		<i>F</i>	<i>p</i>
Adventure or Travel	Between Groups	.86	.522
Life Change	Between Groups	.47	.703
Financial	Between Groups	.48	.695
Career	Between Groups	.36	.779
Concern for Children	Between Groups	.32	.813
Family	Between Groups	.33	.802
Motivation	Between Groups	.21	.890

These results indicate that academics in this sample’s motivation to expatriate was not influenced by the duration of their international career experience here in South Africa.

7.7.7.2 Expatriation Experience and Duration of International Career Experience in South Africa

As indicated in Table 7.36, there are no statistically significant differences amongst the components of Fulfillment of Workplace Expectations ($f=.70, p>0.05$) and Family and Friends Support ($f=1.31, p>0.05$) for the Expatriation Experience sub-scale. The components, Pre-departure Phase Experience ($f=4.56, p>0.05$), School Support ($f=2.97, p>0.05$), and Support from Other Expatriates ($f=2.89, p>0.05$) as well as the overall Expatriation Experience sub-scale score ($f=2.97, p>0.05$) are significantly different between the categories of the Periods of International Career Experience at the 95% level ($p>0.05$). The latter components are now discussed.

Table 7-36 ANOVA: Components of Expatriation Experience sub-scale and Duration of International Career Experience

ANOVA			
		<i>F</i>	<i>p</i>
Pre-departure Phase Experience	Between Groups	4.56	.005*
Fulfillment of Workplace Expectations	Between Groups	.70	.554
Family and Friends Support	Between Groups	1.31	.278
School Support	Between Groups	2.97	.037*
University Community Support	Between Groups	2.89	.041*
Experience (overall)	Between Groups	2.97	.037*

Those academics in the sample, that have been in South Africa for between 1-3 years have the highest mean score for the Pre-departure Phase Experience (mean=5.09), followed by those that have been in South Africa for between 4-6 years (mean=4.48), then expatriate academics in the sample that have been here for between 7-10 years (mean=4.23), and finally those that have been in South Africa for longer than 10 years (mean=3.07). These responses range from agreeing slightly to disagreeing slightly that this dimension played a significant role in academics’ expatriation experience. These results show that those academics in the

sample that have been here a shorter time, appear to have a more clear recollection of their recent experiences as well as having a more positive experience when compared to those academics in the sample that have been here longer.

Those academics who have been in South Africa for 1-3 years have the highest mean score for the component School Support (mean=5.44), followed by those who have been in South Africa for between 4-6 years (mean=4.88). Those academics in the sample that expatriate academics in the sample in South Africa for over ten years (mean=4.20). These responses range from agreeing slightly to no opinion regarding the level of support academics received from their schools during their expatriation experience. These results show that those academics in the sample that have been in South Africa for a shorter period of time tend to perceive the level of support received from their schools more positively than those here for a long time.

Those academics in the sample that have been in South Africa for 7-10 years have the highest mean score (mean=4.40); then, those academics in the sample that have been in South Africa for 1-3 years were next (mean=4.33). Those academics that were in South Africa for 4-6 years (mean=4.278) followed and finally, those academics in the sample that were here for over ten years (mean=3.21). These responses range from no opinion to disagree slightly concerning the level of support they have received from other expatriates in their work environment and the community at large.

7.7.8 To investigate whether the field of study at UKZN influences their motivation to expatriate and international career experience

The results of the statistical analysis using inferential statistics for the demographic variable, the field of study at UKZN is presented below.

7.7.8.1 Motivation to Expatriate and the Field of Study of respondents

The results in Table 7.37 show that there are no significant differences in the perceptions of the components of Motivation to Expatriate sub-scale, Seeking Adventure/Travel ($f=1.10$, $p>0.05$), Lifestyle Changes ($f=.86$, $p>0.05$), Financial Reasons ($f=2.28$, $p>0.05$), Career Matters ($f=.17$, $p>0.05$), Concern for Safety and Security of Children ($f=.84$, $p>0.05$) and Family Matters ($f=.14$, $p>0.05$) among the different fields of study at the 95% level ($p<0.05$).

Table 7-37 ANOVA for components of Motivation to Expatriate sub-scale by category of Field of Study

ANOVA			
		<i>F</i>	<i>p</i>
Adventure or Travel	Between Groups	1.10	.353
Life Change	Between Groups	.86	.464
Financial	Between Groups	2.28	.097
Career	Between Groups	.17	.916
Concern for Children	Between Groups	.84	.474
Family	Between Groups	.14	.935
Motivation	Between Groups	.43	.731

7.7.8.2 Expatriation Experience and Field of Study

The results of the ANOVA in Table 7.38 show that there were no statistically significant differences among the components of the Pre-departure Phase Experience ($f=2.56$, $p>0.05$), Fulfillment of Workplace Expectations ($f=.37$, $p>0.05$) and School Support ($f=2.16$, $p>0.05$).

However, the components, Family and Friends Support ($f=4.42$, $p>0.05$) and Support from Other Expatriates ($f=3.11$, $p>0.05$) and the Expatriation Experience (overall) ($f=5.13$, $p>0.05$) are significantly different between the field of study to which the academic in the sample belongs at a 95% level ($p>0.05$). These results are discussed below.

Table 7-38 ANOVA for dimensions of Expatriation Experience by Field of Study

ANOVA			
		<i>F</i>	<i>p</i>
Pre-departure Phase	Between Groups	2.56	.069
Fulfillment of Expectations	Between Groups	.37	.775
Family and Friends	Between Groups	4.42	.006*
School Support	Between Groups	2.16	.113
University Community Support	Between Groups	3.11	.031*
Experience	Between Groups	5.13	.003*

The academics in the sample who belong to the College of Law and Management Studies (LMS) had the highest mean score for the Expatriation experience sub-scale (mean=5.57), followed by those in the College of Agriculture, Engineering and Science (AES) (mean=5.04), next were those in the College of Health Sciences (mean=4.48), and last those in the College of Humanities (mean=3.91). These responses range from agree slightly to disagree slightly. Therefore the component of family and friends support has a certain degree of influence on the expatriation experience across the different fields of study.

Those academics in the sample, in the College of AES have the highest mean score for the support received from other expatriates (mean=4.33), followed by those in the College of LMS (mean=4.48), then those in College of Humanities (mean=3.00) and last College of Health Sciences (mean=2.83). These responses range from academics having no definite

opinion in the both the colleges of AES and LMS, to those in Health Sciences who disagree that there was an acceptable level of support from the other expatriates in their work environments and their communities at large. The overall score for the Expatriation experience sub-scale was found to be statistically significant ($f=5.17$, $p>0.0\%$). These results illustrate that all the components on the Expatriation experience sub-scale played a moderately positive role the international career experience of expatriate academics in the sample. In the next section, the results of statistical analysis using inferential statistics in order to explore Objective 9 are presented.

7.7.9 To investigate whether there is a relationship between the expatriate academic's motivation to expatriate and international career experience

The results of the statistical analysis using inferential statistics for the correlational matrix for the relationship between the motivation to expatriate and the international career experience of expatriate academics at UKZN is presented in Table 7.39.

Table 7-39 Results of Pearson's product-moment correlation coefficient for the Motivation to Expatriate and the Expatriation Experience sub-scales

		Pearson Correlation	p	N
Pre-departure Phase	Adventure or Travel	.01	.922	83
	Life Change	-.23	.036	83
	Financial	.21	.055	83
	Career	.14	.198	83
	Concern for Children	.14	.205	83
	Family	.03	.821	83
Fulfillment of Expectations	Adventure or Travel	-.11	.333	83
	Life Change	-.06	.571	83
	Financial	.17	.135	83
	Career	.11	.346	83
	Concern for Children	.11	.319	83
	Family	-.03	.818	83
Family and Friends	Adventure or Travel	-.01	.956	83
	Life Change	.02	.892	83
	Financial	.22	.046	83
	Career	.34	.002	83
	Concern for Children	.09	.445	83
	Family	-.03	.821	83
School Support	Adventure or Travel	-.17	.122	83
	Life Change	-.06	.610	83
	Financial	-.11	.315	83
	Career	-.05	.649	83
	Concern for Children	.02	.845	83
	Family	.03	.811	83
University Community Support	Adventure or Travel	.04	.729	83
	Life Change	-.04	.914	83
	Financial	.17	.118	83
	Career	.03	.793	83
	Concern for Children	.05	.683	83
	Family	.06	.565	83
Experience	Adventure or Travel	-.07	.531	83
	Life Change	-.12	.275	83
	Financial	.21	.056	83
	Career	.17	.128	83
	Concern for Children	.13	.240	83
	Family	.02	.849	83

In order to determine whether this relationship exists, Pearson's product moment correlation coefficients were calculated and tested for significance. The Motivation to Expatriate sub-scale comprised six components, namely, Seeking Adventure/Travel, Lifestyle Changes, Financial Feasons, Career Matters, Concern for Safety and Security of Children and Family Matters. The Expatriation Experience sub-scale comprised the Pre-departure Phase Experience, School Support, University Community Support, Fulfillment of Workplace Expectations and Family and Friends Support. The results of the Pearson's correlation coefficient show that there was no statistically significant relationship between the components of the Motivation to Expatriate sub-scale and the Expatriation Experience sub-scale.

In the next section, the results of the descriptive statistics and inferential statistics used to analyse the “Protean and Boundaryless” Career Attitude scale (Briscoe and Hall, 2006) is presented.

7.8 Results of the “Protean and Boundaryless” Career Attitude scale (PBCA) (Briscoe et al, 2006)

The standardised test, the PBCA (Briscoe et al, 2006) was incorporated into the questionnaire distributed to expatriate academics in the sample at UKZN. This was done in order to explore Objective 7 of this study.

The PBCA scale seeks to measure the protean career attitude and the boundaryless career orientations amongst respondents in the sample. These two career orientations are measured using Self-directed Career Management sub-scale and the Values-driven sub-scale that measured the protean career orientation, and the Boundaryless Mindset sub-scale and the Organisational Mobility Preference sub-scale that measured the boundaryless career orientation.

7.8.1 Results of findings using descriptive statistics

Table 7-40 Measures of Central Tendency for the “Protean and Boundaryless” Career Attitude scale

Category	n	Minimum	Maximum	Mean	Std. Deviation
Self-directed Career Management	83	2.38	5.00	4.17	.49
Values Driven	83	2.00	5.00	3.56	.75
Boundaryless Mindset	83	2.25	5.00	3.80	.67
Organisational Mobility Preference	83	1.00	5.00	2.55	.95
Career Attitude (Overall)	83	2.39	4.53	3.52	.43

The mean score of (m= 4.17) shows that respondents perceive that their career attitudes have been influenced to a considerable degree by the items in the Self-directed Career Management sub-scale. The standard deviation (sd=.49) shows a wide variation in responses. Some respondents perceive that their career attitude has been influenced to a limited extent by the items on the Self-directed Career Management sub-scale (Min=2.38) while others respond that their career attitude has been influenced to a great extent (Max= 5.00).

The mean score of (m=3.56) shows that respondents have a moderate response, indicating that their career attitude is to some extent driven by their values. The standard Deviation

(sd=.75) shows a wide variation in responses. Some respondents perceive that their career attitude has been influenced to a limited extent by the items on the Values Driven sub-scale (Min=2.00) while others respond that their career attitude has been influenced to a great extent by their values (Max=5.00).

The mean score of (m= 3.80) shows that respondents have a moderate response to the items on the Boundaryless mindset sub-scale. The standard deviation (sd=.67) shows a wide variation in responses. Some academics in the sample responded that their career attitude is influenced to limited extent (Min=2.25) while others respond that their career attitude has been influenced to a great extent (Max=5.00) by items on the Boundaryless Mindset sub-scale.

The mean score of (m=2.55) shows that respondents perceive that their career attitudes are influenced to a limited extent by the items on the Organisational Mobility Preference sub-scale. The standard deviation (sd=.95) shows wide variation in responses. Some academics in the sample responded that their career attitudes were influenced to little or no extent by the items on the Organisational Mobility Preference sub-scale (Min=1.00) and other indicated that their career attitudes were influenced to a great extent (Max=5.00).

The mean score of (m=3.52) shows that for the overall PBCA scale, respondents indicated that the items on the different sub-scales influenced their career attitudes to a moderate degree. The standard Deviation (sd=.43) shows wide variation. Some academics in the sample responded that their career attitudes were influenced to a limited degree by items of the sub-scales of the PBCA (Min=2.39), while others responded that they influenced their career attitudes to a considerable extent (Max=4.53).

7.8.1.1 Self-directed Career Management

The protean career orientation is measured using two sub-scales, namely the Self-directed career management and the Values driven scale. The Self-directed Career Management sub-scale of the PBCA scale, developed by Briscoe and Hall (2006), evaluates the degree to which individuals demonstrate a self-directed career orientation in their personal career management. The Self-directed Career Management sub-scale, in Figure 7.23 below, highlights the items that influenced the respondents' career attitude using a five-point rating scale where (1) is Little or No Extent and (5) is Great Extent. The mean score values are presented in descending order:

- “C1 Freedom to choose my own career path (mean=4.57, sd=.74)
- C2 I am in charge of my own career (mean= 4.46, sd=.74)
- C3 Overall I have a very independent, self-directed career (mean=4.40, sd=.75)
- C4 I am responsible for the success/failure in my career (mean= 4.37, sd=.89)
- C5 Ultimately I depend on myself to move my career forward (mean=4.34, sd=.80)
- C6 Where my career is concerned, I am very much “my own person” (mean=4.21, sd=.97)
- C7 In the past I have relied more on myself than on others to find a new job when necessary (mean=4.17, sd.=1.03)
- C8 When development opportunities have not been offered by my university I have sought them out on my own (mean= 3.07, sd.= 1.56)”.

The results below indicate that the respondents in this study seem to take a very proactive role in managing their careers, therefore taking greater responsibility for their personal career choices and opportunities.

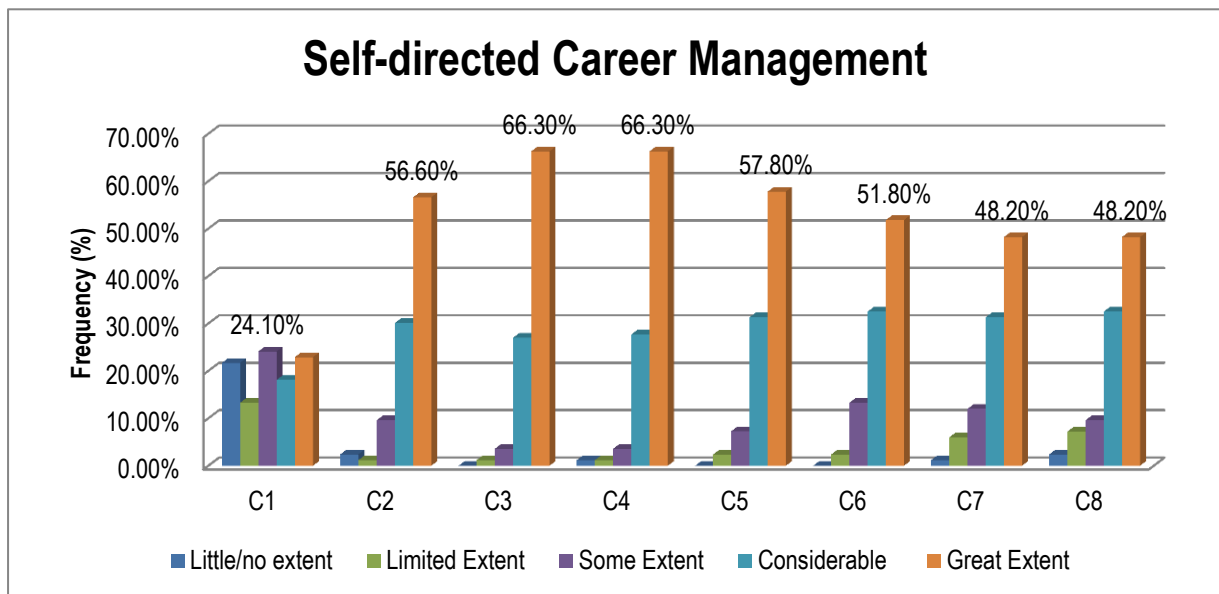


Figure 7-25 Frequency distribution of items on the Self-directed Career Management sub-scale

The highest mean score of 4.57 was obtained for the item dealing with the respondent’s freedom to choose their own career path (66.3% great extent, 27.7% considerable extent). Secondly, the mean score of 4.46 was obtained for the item dealing with the respondent being in charge of their own career destiny (57.8% great extent, 31.3% considerable extent). Thirdly, a mean score of 4.40 was obtained for the item dealing with the respondent’s description of their career as independent and self-directed (66.3% great extent, 27.7%

considerable extent). Fourthly, the mean score of 4.37 was obtained for the item dealing with the respondent taking responsibility for their own success or failure in their career (56.6% great extent, 30.1% considerable extent). Fifthly, the mean score of 4.34 was obtained for the item dealing with the respondent depending on him/herself to move their careers forward (51.8% great extent, 32.3% considerable extent). The second lowest mean score of 4.21 was obtained for the item where respondent's expressed the attitude where they were very much their own person when it came to their careers (48.2% great extent, 31.3% considerable extent). Next the mean score of 4.17 for the item where respondent's stated that they are responsible for finding a new job (48.2% great extent, 32.5% considerable extent). The lowest mean score of 3.07 was for the item dealing with the respondent taking the initiative when development opportunities were not presented by their university (24.1% considerable extent, 22.9% great extent).

Since this is scale data, three categories of responses were identified to further analyse the findings. The three categories are Low, Moderate, and High. Low scores comprise responses that include Limited Extent/No Extent. Moderate scores include Some Extent. High scores include Considerable Extent and Great Extent.

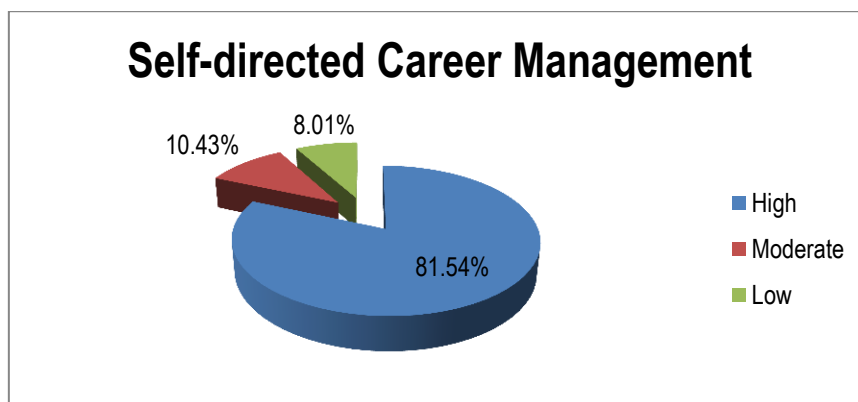


Figure 7-26 Self-directed Career Management scale

Figure 7.26 above indicates that the majority of respondents (81.54%) fall into the high response category for SCDM, while 10.43% exhibit moderate scores. The low response category for SCDM had a smaller number of respondents with 8.01%. Thus the results indicate that the respondents in this study exhibit a strong self-directed management orientation.

7.8.1.2 Values Driven

Individuals who hold protean career attitudes are intent upon using their own values to guide their career. Therefore, they would tend to follow their own conscience and practice morally acceptable behavior. This essence is captured by items C12, C13, C14 which indicate a strong sense of moral behavior. These three items, indicating that respondents have the integrity to withstand pressure from the organisation when they are required to do something that they perceive as wrong by their own standards, have the low mean scores. This means that respondents do not have strong principles to use as ethical standards to guide their behaviour.

The rationale for having a values driven attitude is dealt with by the balance of the items on the scale. These items reflect higher mean scores and therefore would seem to indicate that these respondents characterise career success on their own terms rather than that of the organisation or other outside parties while following their own career related needs. These results show that the scoring on the Values Driven scale have moderate results because there are two distinct subsets of values measured here. Values Driven Scale 1 can be seen to include items C12, C13 and C14, while Values Driven Scale 2 includes items like C9, C10, C11 and C13. Therefore the results could have come about because respondents scored highly on Values Driven 1 and low on Values Driven 2 or low in Values Driven 1 and high on Values Driven 2, or even average on both Values Driven 1 and Values Driven 2. The ambiguity of this scale has led to the moderate results obtained for this sub-scale.

The Values Driven sub-scale in Figure 7.27 below highlights the items that influenced the respondents' career attitude using a five-point rating scale where (1) is Little or No Extent and (5) is Great Extent. The mean score values are presented below in descending order:

- “C9 It does not matter how others evaluate my career choices (mean= 4.08, sd.= 1.12)
- C10 I navigate my career based on my personal priorities (mean= 3.58, sd.= 1.39)
- C11 What I think about what's right in my career is more important to me than what my university thinks (mean=3.46, sd.=1.09)
- C12 Most important to me is my feelings about my career success (mean= 3.10, sd.=1.48)
- C13 I follow my own conscience when asked to go against my values (mean=2.67, sd.= 1.66)
- C14 In the past I have sided with my own values (mean=2.12, sd.= 1.23)”.

The highest mean score of 4.08 was obtained for the item dealing with the respondents being energized by new experiences (45.8% Great Extent, 31.3% Considerable Extent). Secondly, the mean score of 3.94 was obtained for the item that describes respondent’s seeking out projects that allow them to learn new things (39.8% Considerable Extent, 31.3% Great Extent). Thirdly, the mean score of 3.90 was obtained for the item that alluded to the respondents enjoying working with people from outside the university (38.6 Considerable Extent, 30.1% Great Extent). Fourthly, the mean score of 3.81 was obtained for the item dealing with the respondent enjoyment of jobs that allowed them to interact with others from different institutions (37.3% Considerable Extent, 28.9% Great Extent). The third lowest mean score of 3.69 was obtained for the dealing with respondents who enjoyed tasks that allowed them to work outside their school (33.7% Great Extent, 28.9% Some Extent). The second lowest score of 3.65 was obtained for the item dealing with respondents enjoying working with people across institutions (32.5% Great Extent, 30.1% Considerable Extent). The lowest mean score of 3.58 was obtained for the item where respondents have sought opportunities to work outside the university in the past (30.1% Considerable Extent, 28.9% Great Extent).

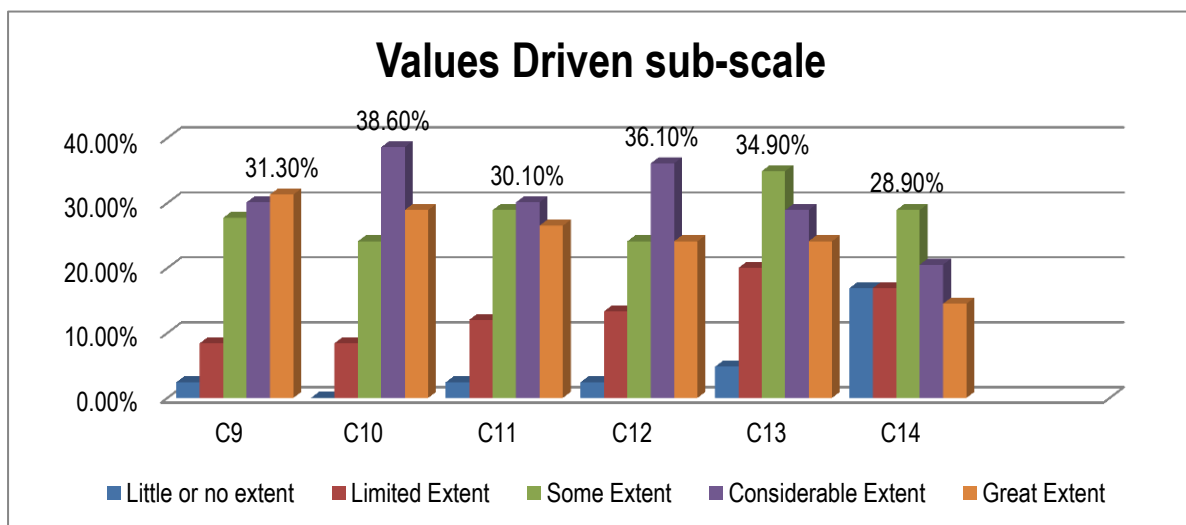


Figure 7-27 Frequency distribution of items on the Values Driven sub-scale

Since this is a scale data, three categories of responses (Low, Moderate and High) were identified to further analyse the findings as explained for the Values Driven sub-scale above and the results are shown in Figure 7.28 below.

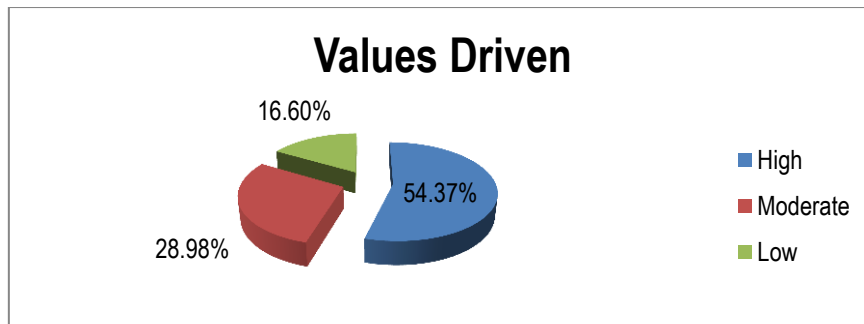


Figure 7-28 Values Driven sub-scale

Figure 7.28 above indicates that the majority of respondents (54.37%) exhibit a high Values Driven career attitude, while 28.98% exhibit a moderate degree. The low response category for Values Driven career attitude had the least number of respondents with 16.6%. Thus the results indicate that the respondents in this study exhibit a strong values-driven orientation.

7.8.1.3 *Boundaryless Mindset sub-scale*

These items measure the respondent's attitude toward their external environment (meso-level) and reflect their level of comfort and enthusiasm about creating and maintaining active relationships across organisational boundaries. Items C16-20 refers to enjoying job assignments that require working outside the organisation; there are also items that express a general attitude of being energized by new experiences and situations (C15 and C22). These items also examine the value of networking and collaborations, in accessing resources other people possess, such as expertise, reputation and cutting edge technologies. The moderate results obtained for this scale could be a reflection of the extensiveness of the individual's networks, that is, the internal and external support structures that the respondent has access to.

The Boundaryless mindset career attitude sub-scale in Figure 7.29 below highlights the items that influenced the respondent's career attitude using a rating scale where (1) is Little or No Extent and (5) is Great Extent. The mean score values are presented in descending order:

- "C15 I am energised by new experiences (mean=4.08, sd.=1.12)
- C16 I seek projects were I learn new things (mean=3.94, sd.=.95)
- C17 I enjoy working with people outside the university (mean=3.90, sd.=.96)
- C18 I enjoy jobs that allow me to interact with others from different institutions (mean=3.81, sd.=1.05)
- C19 I enjoy projects outside the university (mean=3.78, sd.= 1.13)

- C20 I like tasks that allow me to work outside the university (mean=3.69, sd.=1.19)
- C21 I enjoy working with people across institutions (mean=3.65, sd.=1.33)
- C22 I have sought opportunities to work outside the university in the past (mean=3.58, sd.=1.33)”.

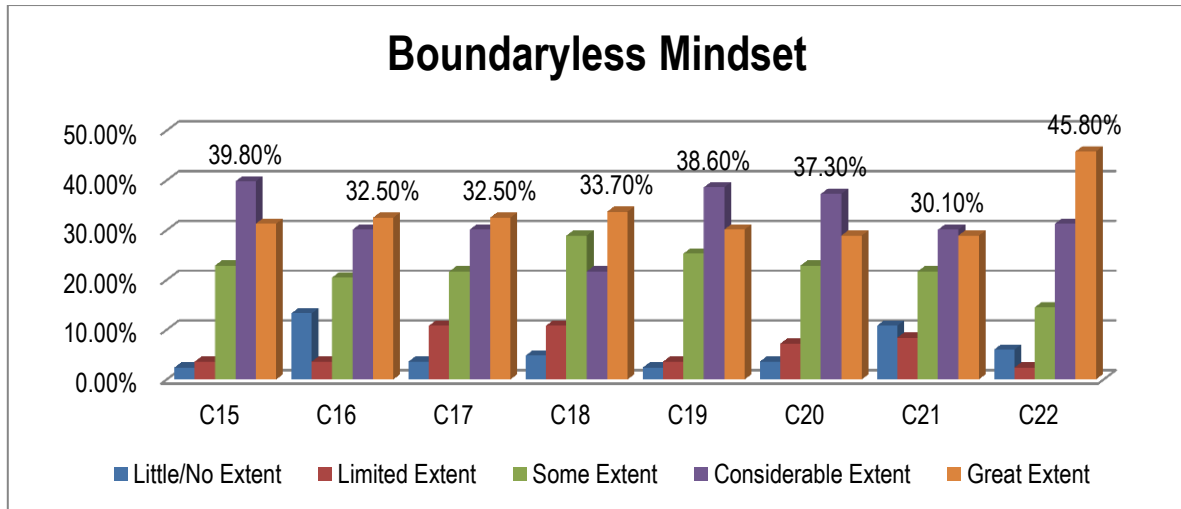


Figure 7-29 Frequency distribution of the items on the Boundaryless Mindset scale

The highest mean score of 4.08 was obtained for the item dealing illustrating the respondent’s being energised by new experiences (45.8% great extent, 31.3% considerable extent). Secondly, the mean score of 3.94 was obtained for the item that describes respondent’s seeking out projects that allow them to learn new things (39.8% considerable extent, 31.3% great extent). Thirdly, the mean score of 3.90 was obtained for the item that alluded to the respondent enjoying working with people from outside the university (38.6 considerable extent, 30.1% great extent). Fourthly, the mean score of 3.81 was obtained for the item dealing with the respondents’ enjoyment of jobs that allowed them to interact with others from different institutions (37.3% considerable extent, 28.9% great extent). The third lowest mean score of 3.69 was obtained for the item dealing with respondents who enjoyed tasks that allowed them to work outside their school (33.7% great extent, 28.9% some extent). The second lowest score of 3.65 was obtained for the item dealing with respondents enjoying working with people across institutions (32.5% great extent, 30.1% considerable extent). The lowest mean score of 3.58 was obtained for the item where respondents have sought opportunities to work outside the university in the past (30.1% considerable extent, 28.9% great extent).

Since this is scale data, the three categories of responses were identified to analyse further the findings. The three categories are low, moderate, and high. Low scores comprise responses that include a Limited Extent/No Extent and Limited Extent. Moderate scores comprise those who respond Some Extent. High scores comprise responses Considerable Extent and Great Extent.

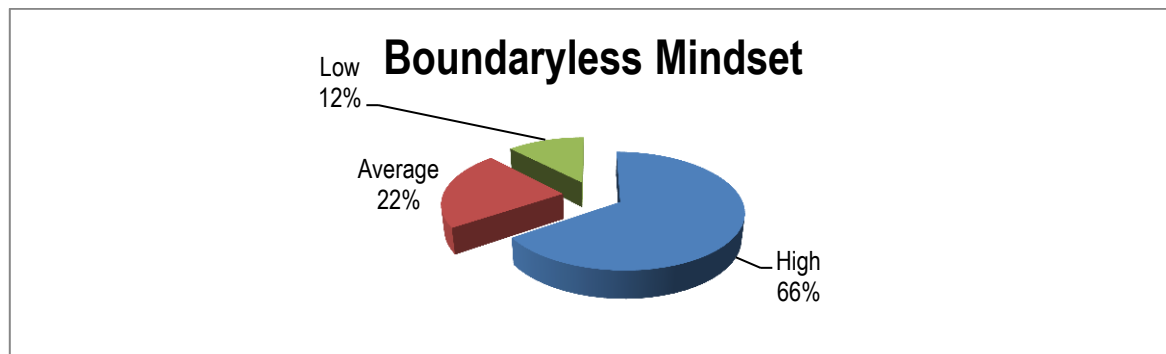


Figure 7-30 Boundaryless Mindset

From the above figure, the majority of respondents (66%) exhibit a high response rate for a Boundaryless Mindset, while 22% exhibited a moderate degree of a Boundaryless Mindset (BM). The low response category for BM had the least number of respondents with 12%. Thus the results indicate that the respondents in this study, exhibit a strong Boundaryless Mindset orientation.

7.8.1.4 Organisational Mobility Preference

These items deal with a respondent's attitude to physical mobility from one organisation to another. The intention here was to measure the respondent's attitude toward mobility and whether or not it is based on their satisfaction with the organisational conditions provided by the current university or the need to find a better fit in the external academic environment. The results obtained here show that respondents do not show a tendency toward physical mobility and this could be due to the following contributing factors, including satisfaction and engagement with the current institution, the limited opportunities in the current economic climate, quality of life in SA and so forth.

The Organisational Mobility Preference sub-scale in Figure 7.31 below highlights the items that influenced the respondent's organisational mobility preference using a five point rating scale where (1) is Little or No Extent and (5) is Great Extent. These items were reverse scored. The mean score values are presented in descending order:

- “C23 I like the predictability of working for one university (mean=3.10, sd.=1.48)
- C24 I would feel lost if I couldn’t work for my university (mean= 2.67, sd.=1.66)
- C25 I would prefer to stay in a familiar university (mean= 2.64, sd.=1.37)
- C26 In my ideal career I would prefer to work for one university (mean=2.27, sd.=1.49)
- C27 If my university offered life time employment I would never desire to seek employment elsewhere (mean=2.12, sd.=1.23)”.

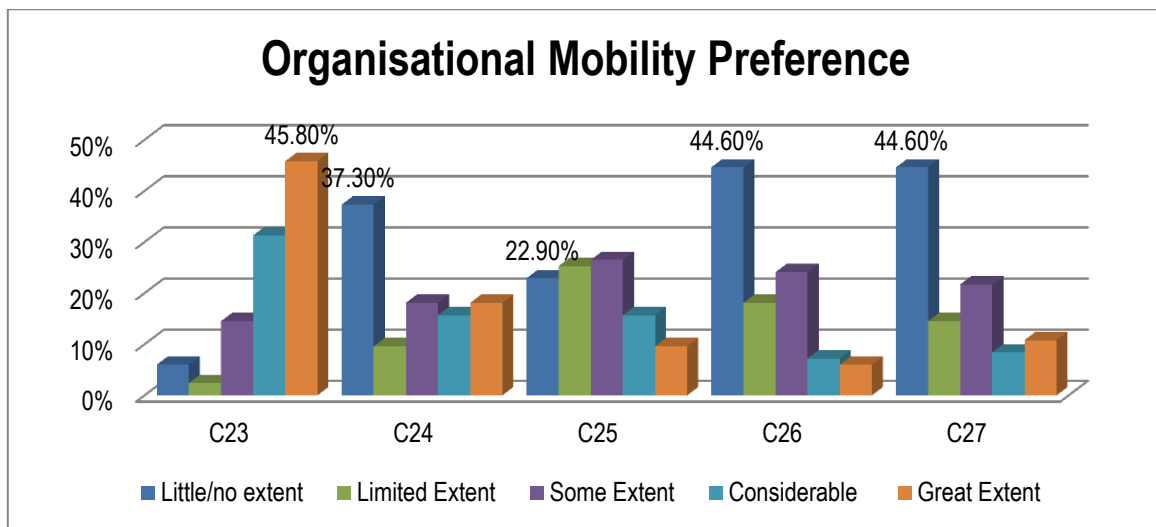


Figure 7-31 Frequency distribution of items in the Organisational Mobility Preference Scale

The highest mean score of 3.10 was obtained for the item dealing with the respondent’s desire for predictability when working for one university (45.8% Great Extent, 31.3% Considerable Extent). The second highest mean score of 2.67 was obtained for the item dealing with the respondent’s feelings of being lost if they could not work for their current university (37.3% Little/No Extent, 18.1% Some Extent and Great Extent). The third highest mean score was for the item dealing with the respondent’s preference to stay at a familiar university (26.5% Some Extent, 25.3% Limited Extent). The second lowest mean score of 2.27 was obtained for the item dealing with the respondent’s perception of the ideal situation where they would only work for one university (44.6% Little/No Extent, 21.7% Some Extent). The lowest mean score of 2.12 was obtained for the item describing the respondent’s desire to have life time employment at this university (44.6% Little/No Extent, 21.7% Some Extent).

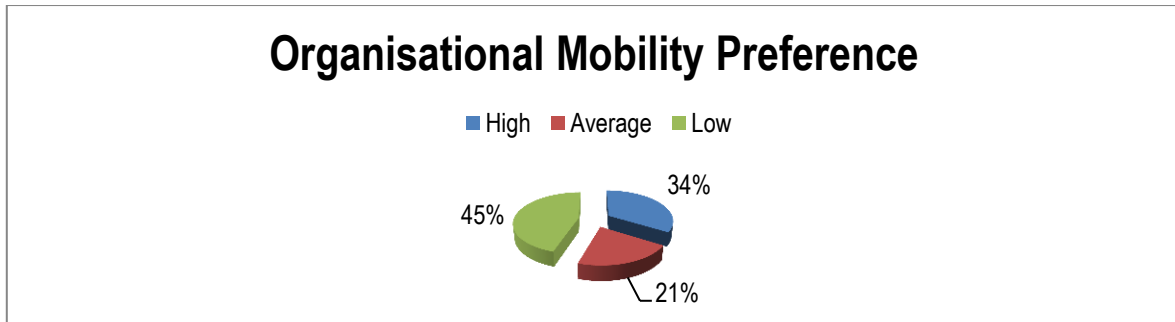


Figure 7-32 Organisational Mobility Preference

Since this is scale data, the three categories of responses were identified to further analyse the findings. The three categories are low, moderate, and high. Low scores comprise responses that include Limited Extent/No Extent and Limited Extent. Moderate scores consist of the responses to Some Extent. High scores comprise responses to a Considerable Extent and Great Extent.

From the above figure, the majority of respondents (45%) exhibit a low response rate for an Organisational Mobility Preference, while 34% exhibited a high degree of organisational mobility preference. The moderate response category for Organisational Mobility Preference had the least number of respondents with 21%. Thus the results indicate that the respondents in this study, exhibit a low organisational mobility preference orientation. This indicates that respondents in this study, do not exhibit the characteristics that indicate they would be willing to physically relocate or move across organisational and international boundaries.

7.8.2 Results of findings using inferential statistics

Inferential statistics were used to test if demographic factors such as age, gender, marital status, number of dependents, location of family, duration of international career experience in South Africa and field of study have an influence on the respondents' responses on the PBCA. The T-test and Analysis of Variance (ANOVA) were used to explore Aim 2, Objectives 8 and 9 of this study. Firstly, the results for objective 8 for the PBCA are presented. This is followed by the results for Objective 9 for the PBCA.

The results of the statistical analysis using inferential statistics for Objective 8 are presented in the next section.

7.8.2.1 To investigate whether age influences expatriate academics career orientation

There is no statistically significant differences in the perceptions respondents have of their career attitudes regarding Self-directed Career Management ($f=2.13$; $p > 0.05$), Boundaryless Mindset ($f = 2.21$; $p > 0.05$) and Organisational Mobility Preference ($f = 1.97$; $p > 0.05$).

Table 7-41 T-test for components of “Protean and Boundaryless” Career Attitudes by Age group

		<i>F</i>	<i>p</i>
Self-directed Career Management scale	Between Groups	2.13	.084
Values Driven scale	Between Groups	3.50	.011*
Boundaryless Mindset	Between Groups	2.12	.086
Organisational Mobility Preference	Between Groups	1.97	.107
Career Attitude	Between Groups	3.96	.006*

However, there is a statistically significant difference in Values Driven perceptions ($f= 3.50$; $p >0.05$) among the different categories of age groups. These results are discussed. Regarding the PBCA scale, there is a significant difference in the responses to this sub-scale between the 31- 35 and the 36-40 and 50+ age groups for this scale. There is also a significant difference between the 36-40, 41-50, 41-50 and the 50+ in the perceptions of a Value Driven career attitude among the age groups. The 31-35 group indicated they use their own values compared to the organisation’s values to some extent ($m = 3.21$), while the 36-40 group ($m = 3.8600$) and the 50+ group ($m = 3.87$) use their values to a considerable extent. The 41-50 group ($m = 3.31$) use their values to some extent compared to the 36-40 group who use their values to a considerable extent. The 50+ group ($m = 3.87$) use their values to a considerable extent compared to the 41-50 group, who use their values to some extent when making decisions in their careers.

Concerning the Overall Career Attitudes, the 31 – 35 age group differed significantly with the 36 – 40 age group and the 36 – 40 age group differed significantly with the 41 – 50 and the 50+ age groups. The 31 – 35 age group indicated that overall they displayed the Career Attitude components to some extent ($m = 3.35$) compared to the 36 -40 group who used the dimensions to a considerable extent ($m = 3.89$). The 41 -50 group ($m=3.0470$) and the 50+ group ($m= 3.44$) both displayed the components to some extent compared to the 36 -40 age group who displayed the components to a considerable extent.

7.8.2.2 *To investigate whether gender influences expatriate academics career orientation*

These results show that there are no statistically significant differences between the components Self-directed Career Management ($t=.05$, $p>0.05$), Values Driven ($t=1.55$, $p>0.05$), Boundaryless Mindset ($t=1.75$, $p>0.05$) and Organisational Mobility Preference ($t=1.04$, $p>0.05$) of the PBCA (Briscoe et al, 2006) between the gender groups at the 95% level ($p>0.05$).

Table 7-42 T-test for components of the “Protean and Boundaryless” Career Attitudes between Gender groups

	Equal variances assumed		
	t-test for Equality of Means		
	<i>t</i>	<i>df</i>	<i>p</i>
Self-directed Career Management scale	-.05	80	.959
Values Driven scale	-1.55	80	.125
Boundaryless Mindset	-1.75	80	.084
Organisational Mobility Preference	1.04	80	.303
Career Attitude (overall)	-.88	80	.439

7.8.2.3 *To investigate whether the marital status influences expatriate academics career orientation*

There are no differences between the marital status of participants with regards to the PBCA (Briscoe et al, 2006) components, Self-directed Career Management ($t=.48$, $p>0.05$), Values Driven ($t=.35$, $p>0.05$), Boundaryless Mindset ($t=.11$, $p>0.05$), Organisational Mobility Preference ($t=1.18$, $p>0.05$) at the 95% level ($p>0.05$). These results indicate that the marital status of respondents have no significant influence on their career orientation.

Table 7-43 T-test of components of PBCA between marital status groups

	Equal variances assumed		
	t-test for Equality of Means		
	<i>t</i>	<i>df</i>	<i>p</i>
Self-directed Career Management scale	.48	81	.631
Values Driven scale	.35	81	.727
Boundaryless Mindset	.12	81	.914
Organisational Mobility Preference	-1.18	81	.284
Career Attitude (overall)	-.36	81	.799

7.8.2.4 *To investigate whether the number of dependents expatriate academics have influences their career orientation*

There are no differences between the groupings of the number of dependents with regards to the PBCA (Briscoe et al, 2006) components, that is Self-directed Career Management ($f=.55$, $p>0.05$), Values Driven ($f=.96$, $p>0.05$), Boundaryless Mindset ($f=1.86$, $p>0.05$), Organisational Mobility Preference ($f=1.73$, $p>0.05$) at the 95% level ($p>0.05$). Therefore

this would imply that the number of dependents respondents have does not significantly impacted on their career attitudes.

Table 7-44 ANOVA: Components of “Protean and Boundaryless” Career Attitude scale and the Number of Dependents

		<i>F</i>	<i>p</i>
Self-directed Career Management scale	Between Groups	.55	.742
Values Driven scale	Between Groups	.96	.514
Boundaryless Mindset	Between Groups	1.86	.131
Organisational Mobility Preference	Between Groups	1.73	.137
Career Attitude	Between Groups	2.06	.080

7.8.2.5 To investigate whether the location of the expatriate academics family influences their career orientation

The independent samples T-test for the Location of the expatriate’s family and the components of the PBCA scale (Briscoe et al, 2006), Self-directed Career Management ($t=.21, p>0.05$), Values-driven ($t=.47, p>0.05$), Boundaryless Mindset ($t=.14, p>0.05$), Organisational Mobility Preference ($t=.33, p>0.05$) shows no significant differences at the 95% level ($p>0.05$). These results illustrate that the location of the expatriates’ families has no influence on their career attitudes.

Table 7-45 T-test - components of “Protean and Boundaryless” Career Attitude scale and Location of Expatriate's Family

	Equal variances assumed		
	t-test for Equality of Means		
	<i>t</i>	<i>df</i>	<i>p</i>
Self-directed Career Management scale	-.21	80	.831
Values Driven scale	-.47	80	.637
Boundaryless Mindset	.14	80	.893
Organisational Mobility Preference	-.33	80	.746
Career Attitude	-.39	80	.698

7.8.2.6 To investigate whether the numbers of years of experience expatriate academics have influences their career orientation

The results indicate that the following components of the PBCA (Briscoe et al, 2006) did not produce significant findings: Self-directed Career Management ($f=.58, p>0.05$), Values-Driven ($f=1.23, p>0.05$) and Organisational Mobility Preference ($f=1.17, p>0.05$).

The results indicate that the dimension of Boundaryless Mindset ($f=3.36, p>0.05$) is significantly different between categories of Years of Experience as an Academic at the 95% level ($p<0.05$). Those with the highest mean score were from the 11-15 year group (mean=4.25), who consider themselves to have a boundaryless mindset to a considerable extent; second were those from the 1-5 year group (mean=3.77), who considered themselves

as having a boundaryless mindset to some extent; third were those in the 6-10 year group (mean=3.75), who felt they have a boundaryless mindset attitude to some extent; and last those in the 16+group (mean=3.59), who also felt that they had a boundaryless mindset to some degree. This would imply that the number of contacts and how far and wide their networks range would depend on how long they have been academics. Therefore the more experience they have the more likely to have more collaborations outside the university and across other institutions.

Table 7-46 ANOVA: Components of the PBCA and Years of Experience as an Academic

		<i>F</i>	<i>p</i>
Self-directed Career Management scale	Between Groups	.58	.700
Values Driven scale	Between Groups	1.23	.305
Boundaryless Mindset	Between Groups	3.36	.023*
Organisational Mobility Preference	Between Groups	1.17	.367
Career Attitude (overall)	Between Groups	2.01	.120

7.8.2.7 *To investigate whether the duration of the international career experience in South Africa influences expatriate academics career orientation*

Table 7-47 ANOVA: Components of “Protean and Boundaryless” Career Attitude scale and the Duration of Expatriation Experience in South Africa

		<i>F</i>	<i>p</i>
Self-directed Career Management scale	Between Groups	.55	.653
Values Driven scale	Between Groups	1.33	.270
Boundaryless Mindset	Between Groups	4.58	.006*
Organisational Mobility Preference	Between Groups	4.15	.009*
Career Attitude (overall)	Between Groups	2.92	.039*

Table 7.47 shows that there is no significant difference in the perceptions of respondents in the different durations of expatriation experience in respect of their career attitudes, the Self-directed Career Management ($f=.55$, $p>0.05$) and Values Driven ($f=1.33$, $p>0.05$) components of the PBCA Scale (Briscoe et al, 2006).

However, there are statistically significant differences in the Boundaryless Mindset ($f=4.58$; $p>0.05$), the Organisational Mobility Preference ($f=4.15$; $p>0.05$) and the overall career attitude component ($f=2.92$; $p>0.05$). The components with significant differences are discussed below. Respondents in the 7-10 year group had the highest mean score (mean=4.01), followed by those in the 4-6 year group (mean=3.90), then the 1-3 year group (mean=3.74), and last those academics here for more than ten years (mean=3.38). These responses range from having a BM attitude to a considerable extent to having a BM attitude to some extent. These results indicate that the more time academics spend in SA, the more likely they are to develop their own networks and collaborate with colleagues from outside the university and at other institutions as they have become more familiar with their working environment. Those academics in the 7-10 year group have the highest mean score (mean=2.99), followed by those in the 1-3 year group (mean=2.84), next we have those in the 4-6 year group (mean=2.24) and last those in the over ten year group (mean=2.07). These responses indicate that all groups have an organisational mobility preference to a limited extent. These results could indicate that academics in the sample, across all durations of experience at the university experience a comfortable level of job satisfaction and organisational commitment as they would not consider relocation to another institution freely.

Regarding the Overall Career Attitudes, the 1-3 year group differed significantly with the 4-6 year group and the 7-10 year group. The 1-3 year group indicated that overall they displayed the Career Attitude components to some extent ($m=3.56$) compared to the 4-6 group who displayed the component to some extent ($m = 3.44$). The 7-10 year group who displayed the components to some extent ($m=3.49$).

7.8.2.8 To investigate whether the fields of study at UKZN influences expatriate academics career orientation

In Table 7.48 the ANOVA test is done to determine if any significant differences exist between the components of PBCA (Briscoe et al, 2006) and the fields to which participants belong.

Table 7-48 ANOVA for components of Career Attitude by Field of Study

		F	p
Self-directed Career Management scale	Between Groups	1.22	.310
Values Driven scale	Between Groups	2.64	.055
Boundaryless Mindset	Between Groups	.89	.450
Organisational Mobility Preference	Between Groups	.66	.580
Career Attitude (overall)	Between Groups	.69	.564

The results show that there is no significant difference in the perceptions of the components of PBCA, Self-directed Career Management ($f=1.22$, $p>0.05$), Values Driven ($f=2.64$, $p>0.05$), Boundaryless Mindset ($f=.89$, $p>0.05$) and Organisational Mobility Preference ($f=.66$, $p>0.05$) among the different fields of study at the 95% level ($p<0.05$). The general perception seemed to be that, irrespective of the field of study to which respondents belonged, there were no significant differences in their career attitudes.

In the next section, the results of statistical analysis using inferential statistics in order to explore Objective 9 are presented.

7.8.2.9 To explore if there is there a relationship between the expatriate academic's Motivation to Expatriate and their career orientation at UKZN

The objective here was to determine if there was a relationship between the respondent's Motivation to want to expatriate and their career attitude. In order to determine this correlation, Pearson's correlation coefficients were calculated and tested for significance. The Motivation to Expatriate scale has six components, namely Seeking Adventure/Travel, Lifestyle Changes, Financial Reasons, Career Matters, Concern for Safety and Security of Children and Family matters. The PBCA scale is made up of four components, namely, Self-directed Career Management, Values Driven, Boundaryless Mindset and Organisational Mobility Preference. The results of the Pearson's correlation test indicate there are no significant relationships between the respondent's Motivation to Expatriate and their career attitudes.

Table 7-49 Results of Pearson Correlation coefficient for the components of the PBCA and Motivation to Expatriate

		Pearson Correlation	p	N
Self-directed Career Management scale	Adventure or Travel	.01	.956	83
	Lifestyle Changes	.07	.517	83
	Financial Reasons	.07	.540	83
	Career Matters	.12	.266	83
	Concern for Children	-.06	.566	83
	Family Matters	-.19	.083	83
	Motivation	.03	.817	83
Values Driven scale	Adventure or Travel	.00	.969	83
	Lifestyle Changes	.11	.306	83
	Financial Reasons	-.16	.143	83
	Career Matters	-.06	.568	83
	Concern for Children	.05	.664	83
	Family Matters	-.10	.393	83
	Motivation	-.05	.676	83
Boundaryless Mindset	Adventure or Travel	.03	.823	83
	Lifestyle Changes	-.01	.935	83
	Financial Reasons	.00	.984	83
	Career Matters	.08	.456	83
	Concern for Children	.08	.478	83
	Family Matters	-.08	.500	83
	Motivation	.03	.765	83
Organisational Mobility Preference	Adventure or Travel	.11	.317	83
	Lifestyle Changes	.24	.030	83
	Financial Reasons	.17	.132	83
	Career Matters	.11	.315	83
	Concern for Children	.14	.207	83
	Family Matters	.19	.094	83
	Motivation	.26	.017	83
Career Attitude	Adventure or Travel	.07	.507	83
	Lifestyle Changes	.20	.075	83
	Financial Reasons	.04	.712	83
	Career Matters	.10	.366	83
	Concern for Children	.11	.324	83
	Family Matters	-.02	.836	83
	Motivation	.14	.197	83

7.8.2.10 To explore if there is there a relationship between the expatriate academic's Expatriation Experience and their career orientation at UKZN

The objective was to determine if there was a relationship between the respondent's Experience of expatriation and their career attitudes. In order to explore this relationship, Pearson's correlation coefficients were calculated and tested for significance. The Expatriation experience sub-scale has five components, namely, Pre-departure Phase Experience, Fulfillment of Workplace Expectations, Family and Friends Support, School Support and University Community Support, while the PBCA scale (Briscoe et al, 2006) has four components, namely, Self-directed Career Management, Values Driven, Boundaryless Mindset and Organisational Mobility Preference.

Table 7-50 Correlation between Expatriation Experience and Career Attitude

		Pearson Correlation	p	N
Fulfillment of workplace expectations	Self-directed Career Management scale	.05	.633	83
	Values Driven scale	.13	.250	83
	Boundaryless Mindset	-.06	.563	83
	Organisational Mobility Preference	.23*	.037	83
University community support	Self-directed Career Management scale	-.11	.310	83
	Values Driven scale	-.09	.377	83
	Boundaryless Mindset	.09	.385	83
	Organisational Mobility Preference	.28*	.010	83
* Correlation is significant at the 0.05 level (2-tailed)				

The results of the Pearson correlation coefficient test show that there is a statistically significant relationship between:

- Fulfillment of Workplace expectations and Organisational Mobility (OM) Preference (r=.23; p<0.05)
- University Community Support and Organisational Mobility Preference (OM) (r=.28; p<0.05)

These results indicate that there is a positive relationship between the respondent’s fulfillment of workplace expectations during their expatriation experience and their organisational mobility preference. The results also indicate that there is a positive relationship between the respondent’s perception of university community support and their organisational mobility preference.

The correlation matrix of all these variables namely, the respondent’s Experience of expatriation, career attitudes and their Motivation to expatriate has been presented in Table 7.51.

Table 7-51 Correlation between the Motivation, Experience and PBCA variables

		Pearson Correlation	p	N
Fulfillment of workplace expectations	Self-directed Career Management scale	.05	.633	83
	Values Driven scale	.13	.250	83
	Boundaryless Mindset	-.06	.563	83
	Organisational Mobility Preference	.23*	.037	83
University community support	Self-directed Career Management scale	-.11	.310	83
	Values Driven scale	-.09	.377	83
	Boundaryless Mindset	.09	.385	83
	Organisational Mobility Preference	.28*	.010	83
* Correlation is significant at the 0.05 level (2-tailed)				

In order to explore this relationship, Pearson's correlation coefficients were calculated and tested for significance. The results of the Pearson's correlation test indicate there are no significant relationships between the respondent's Expatriation experience, career attitudes and their Motivation to expatriate.

7.9 Conclusion

This chapter has presented the findings of Phase 2 of this study that is the results of the survey using the instrument, "The Career Experiences of Expatriate Academics at UKZN". As this was a self-designed questionnaire, the chapter presented an overview of the development process of the instrument and the final amended instrument is presented in Appendix F.

Next the demographic profile of the respondents in Phase 2 of the study was presented. It was found that the majority of the sample (33.7%) belonged to the 41-50 year age group. Results illustrate that the sample is skewed in terms of gender as over 80% of the total sample were males. It was found that the majority of the sample was single (54.6%) while more than 82% of the total sample has dependents, in fact most respondents have children under the age of ten (60.24%). The majority of respondents have their families here with them in SA (74.7%). Most respondents have been in SA for between 7-10 years, and would indicate that they raised their families here.

Results of the survey indicate that the majority of respondents in the sample are from Zimbabwe, followed by India, then Nigeria, Ethiopia, Ghana and Cameroon. Other international countries have either one or two representatives in the sample. Therefore in terms of regional talent supply, UKZN is sourcing the majority of its expatriate academics from Africa, specifically Zimbabwe, followed by Asia, then Europe and finally the Americas. Almost two thirds of the sample had not worked at any other SA university, this shows that they specifically chose to come to UKZN. Almost 93% of the sample is on the permanent staff despite more than half of the sample being on work permits. More than half the sample has been in academia for between 6-16 years.

The respondents in the sample are highly qualified, with 75.9% having their doctoral degrees and more than 70% belonging to the College of Science, Agriculture and Engineering. Unfortunately, despite being highly qualified and possessing scarce skills, the majority of the

sample still only hold lecturer posts (48.2%) and senior lecturer posts (22.9%), with very few in leadership or management positions.

In order to determine the motivating factors that lead to the decision to relocate (research objective 5) descriptive statistics were used to analyse the results of the survey. Respondents in the sample indicated that Career Matters were the most important reason (mean=3.43; sd. 1.05) for them relocating to SA and UKZN. The item that addressed the pursuit of meaningful work as a reason to relocate had the highest mean score (4.01; sd.=1.12). Other reasons to relocate scored similar mean scores, such as Seeking Out Adventure and Travel (mean=2.98), Financial Reasons (mean=2.79). This would indicate that these could be ranked as the second most important reasons to relocate amongst academics in the sample. Reasons such as Lifestyle Changes (mean=2.37), Concern for Safety and Security of Children (mean=2.09) and Family Matters (mean=1.40), illustrate that these were not very significant reasons to relocate amongst academics in the sample.

In order to examine the impact of demographic variables such as age, gender, marital status, number of dependents, location of family, duration of international career experience in SA and field of study on the academics in the samples responses to the Motivation to Expatriate sub-scale, research objective 8 was created. Using inferential statistics, no statistically significant results were found for the components of the sub-scale and the different categories of age amongst respondents. However, the overall score of the sub-scale was found to have weak statistically significant relationship with the age categories of the academics in the sample. Results illustrate that there were no statistically significant differences between the components of the Motivation to Expatriate sub-scale and the gender, marital status, number of dependents, duration of international career experience and fields of study of academics in the sample. Statistically significant results were found for the component, financial reasons ($t=2.13$; $p>0.05$) of the Motivation to Expatriate sub-scale and the location of the expatriate's family, those whose families were here in SA scored a higher mean score (mean=2.97) than those whose families were not in SA (mean=2.30). Significant results were also found for the component career matters ($f=3.88$; $p>0.05$) and categories of years of experience, where the highest mean score was for those with 1-5 years of experience (mean=4.0), followed by those with 6-10 years of experience (mean=3.5), then those with 11-15 years of experience (mean=3.22) and finally those with 16+ years of experience (mean=2.99).

In order to investigate the possible relationships between the expatriate academic's motivation to expatriate and their international career experience as well as the relationship

between their motivation to expatriate and their career orientation, research objective 9 was formulated. Unfortunately, no significant results were found to verify the relationship between the expatriate academics motivation to relocate and their international career experience or their career orientation.

In order to investigate the expatriate academics experiences of organisational and social support during expatriation at UKZN (research objective 6) descriptive statistics were used to analyse the results of the survey. Results of the survey illustrate that family and friends support played an important role in the academics international career experience (mean=5.01). The item that scored the highest mean score concerned the maintaining of close relationships with family and friends back home (mean=6.83; sd.= 8.03). 72 % of the sample indicated that this component had a strong role to play in their overall expatriation experience. Other components of the Experience of Expatriation sub-scale such as School Support (mean=4.80), Pre-departure Phase Experience (mean=4.35), University Community Support (mean=4.39) and Fulfillment of Workplace Expectations (mean=3.81) illustrate that respondents did not feel strongly about the influence these had on their expatriation experience. Further analysis of the results of these components using three categories of responses indicated that overall, academics had positive perceptions about the components of the sub-scale and their influence on their experience of expatriation. There was only one component, that is Fulfillment of Workplace Expectations, that 54% respondents perceived negatively. The items here dealt with the expectations of the work situation (at UKZN) not being met (25.3% agreed, 15.7% agreed) and being exceeded (25.3% disagreed, 21.7% no opinion).

In order to examine the impact of demographic variables such as age, gender, marital status, number of dependents, location of family, duration of international career experience in SA and field of study on the academics in the samples responses to the Expatriation Experience sub-scale, research objective 8 was created. Using inferential statistics, statistically significant results were found for the component, Family and Friends Support ($f=4.78$; $p>0.05$) of the sub-scale and the different categories of age amongst respondents as well as the overall score of the sub-scale ($f=2.77$; $p>0.05$) was found to have weak statistically significant relationship with the age categories of the academics in the sample. So too the components of Pre-departure Phase Experience ($f=4.66$; $p>0.05$), School Support ($f=2.97$; $p>0.05$), University Community Support ($f=2.96$; $p>0.05$) as well as the overall score ($f=2.97$; $p>0.05$) and the duration of the international career experience. Statistically significant

results were found for the Family and Friends Support ($f=4.42$; $p>0.05$), University Community Support ($f=3.11$; $p>0.05$) and the overall score ($f=5.13$; $p>0.05$) and the field of study. Unfortunately, no statistically significant differences were found between the components of the sub-scale and gender, marital status, number of dependents, location of expatriate's family and years of experience as an academic.

In order to investigate the possible relationships between the expatriate academic's international career experiences as well as the relationship between their motivation to expatriate and their career orientation, research objective 9 was formulated. Unfortunately, no significant results were found to verify the relationship between the expatriate academics motivation to relocate and their international career experience. Significant relationships were found for the component Fulfillment of Workplace Expectations (Expatriation Experience sub-scale) and Organisational Mobility Preference (OM) ($r=.23$; $p<0.05$) (PBCA) and University Community Support (Expatriation Experience sub-scale) and Organisational Mobility Preference (OM) ($r=.28$; $p<0.05$) (PBCA).

In order to investigate research objective 7 of the study, the career orientation of academics in the sample, descriptive analysis of the results of the PBCA (Briscoe et al, 2006) was done. Results indicate that the respondents in the sample, strongly identify themselves as being self-directed in their careers (mean=4.17; $sd=.49$), while identifying themselves as being values-driven (mean=3.56), having a boundaryless mindset (mean=3.80) to a moderate degree. While respondents identify themselves as having a preference for organisational mobility to a limited extent (mean=2.55). The items on the SDCM sub-scale of the PBCA (Briscoe et al, 2006) all scored mean scores of 4 and above, indicating that the academics in the sample do have a strong SDCM orientation. The items on the VD sub-scale of the PBCA (Briscoe et al, 2006) showed that item C9 (mean=4.08; 45.8% great extent, 31.3% considerable extent) had the highest mean score. However, the mean scores for C13 and C14 indicate that respondents followed their own conscience (mean=2.67) and sided with their own values (mean=2.12) to a limited extent. The items on the BM sub-scale of the PBCA (Briscoe et al, 2006) illustrate that item C15 (mean=4.08; 45.8% great extent, 31.3% considerable extent) had the highest mean score. The other items on the sub-scale scored mean scores of between 3.94 and 3.58. The items on the OM sub-scale of the PBCA (Briscoe et al, 2006) showed that item C23 (mean=3.10; 45.8% great extent, 31.3% considerable extent) had the highest mean score. The other items on the sub-scale scored mean scores of between 2.67 and 2.12.

Further analysis of the results of these components using three categories of responses indicated that overall, academics had high scores for three of the sub-scales of the PBCA (Briscoe et al, 2006) concerning their career orientation. However, the majority of respondents 45% exhibit a low response rate for a OM career orientation.

In order to examine the impact of demographic variables such as age, gender, marital status, number of dependents, location of family, duration of international career experience in SA and field of study on the academics in the samples responses to the PBCA (Briscoe et al, 2006), research objective 8 was created. Using inferential statistics, statistically significant results were found for the Values-driven sub-scale ($f=3.50$; $p>0.05$) as well as the overall Career Attitudes scale (mean=3.96) and the different categories of age groups amongst respondents. Those in the 31-35 year age group indicated that they used their own values to some extent (mean=3.21), while the 36-40 year age group and the 50+ age group use their own values to a considerable extent. The 41-50 year age group uses its own values to some extent when compared to the 36-40 year age group. Overall, those respondents in the 31-35 year age group displayed career attitude components to some extent compared to the 36-40 year age group. Those in the 41-50 and 50+ year age groups both displayed the components to some extent, while the 36-40 year age group displayed the components to a considerable extent.

A significant difference was found for the BM sub-scale of the PBCA (Briscoe et al, 2006) and the categories of the number of years of experience as an academic ($f=3.36$; $p>0.05$). Those respondents in the 11-15 year category had the highest mean score (4.25), and consider that they have a boundaryless mindset to a considerable extent. Those academics with 1-5, 6-10 and 16+ years of experience, considered themselves as having a boundaryless mindset to some extent. Significant results were found for the duration of the international career experience in SA and the BM ($f=.55$; $p>0.05$) and OM ($f=1.33$; $p>0.05$) as well as the overall career attitudes ($f=2.92$; $p>0.05$) of academics in the sample. Those academics in the 7-10 year duration of the international career experience in SA had the highest mean score (mean=4.01) for the BM career attitude as well as for the OM career attitude (mean=2.89). Overall, the mean scores for all durations of expatriation experience in SA reflected all career attitudes to some extent. Results indicate that gender, marital status, number of dependents, location of expatriates family and field of study do not have significant influence over the career attitudes of respondents in the study.

To conclude, this chapter presented the findings of Phase 2 of this study, that is, the results of the survey using the instrument, “The Career Experiences of Expatriate Academics at UKZN”. In the next chapter the results of Phase 3 of the study, that is, the qualitative phase where interviews were conducted with academic line managers and HR specialists, is presented.

Chapter 8

Presentation of Results: Qualitative Phase

8.1 Introduction

This chapter presents the findings of Phase 3: Qualitative phase of the study. The chapter covers several themes which pertain to key areas and questions of the research. The findings are presented in accordance with Aim 3, research objectives 10 and 11 of the study. The chapter is divided into two sections; firstly, the chapter deals with the perceptions of academic line managers regarding the challenges they face while managing expatriate academics on a day-to-day operational level. The challenges associated with the management of expatriate academics as perceived by their academic line managers were categorised into macro-contextual challenges (accommodation/transport/banking; immigration issues, inefficiency/incompetence of government officials at Home Affairs and workplace legislation) as well as meso-level challenges (language proficiency; lack of formal induction/orientation programme; cultural assimilation; incompetent HR administration; access to research funding; national versus international benchmarking; different pedagogical approaches, interactions with the student body). The benefits and opportunities associated with managing expatriate academics as perceived by their academic line managers were classified as organisational opportunities (diversity; curriculum development; international networks and collaborations; providing highly qualified scarce skills; career progression).

Secondly, the chapter deals with the challenges associated with the attraction and retention of expatriate academics, these include: macro-contextual challenges such as workplace legislation; immigration issues; skills shortages; verification of qualifications; meso-level challenges as well as the factors that HR specialists perceived that the university exhibited in order to be the 'employer of choice' to attract scarce human resources to UKZN. These included: UKZN's relocation policy; location; reputation; and its research driven ethos.

8.2 Challenges and opportunities associated with the management of expatriate academics as perceived by their academic line managers

This section analyses academic line management's perceptions of the challenges and opportunities associated with the management of expatriate academics in their respective disciplines. This has been done to provide evidence for research objective 10 of the study. Interviews were conducted with fourteen line managers who each had more than three expatriate academics in their respective disciplines. This provided important evidence of the perceptions academic line managers have of the challenges and opportunities they face when trying to manage scarce human capital, namely, expatriate academics, in order to facilitate teaching and learning in our scarce skills disciplines.

For a detailed description of the academic line managers that participated in the interview phase of this study refer to Table 5.7 in the methodology chapter. Eleven of the fourteen participants were males while three were female. Three Deans (Head of Schools) and eleven academic leaders of different disciplines were interviewed. The Deans interviewed belonged to the Faculties of Mathematics, Statistics and Computer Science, Health Science and Law. The academic leaders that were interviewed belonged to the following disciplines; Statistics, Physics, Chemistry, Information Systems, Agriculture, Life Sciences, Economics, Chemical Engineering, Electronic Engineering, Clinical Medicine and Conservation Science. The majority of academic line managers interviewed belonged to the College of Agriculture, Science and Engineering, followed by the College of Law and Management Studies and Health Sciences. Unfortunately, none of the academics' line managers in the College of Humanities who were approached to participate in the study granted permission for the interview.

The interview schedule used for academic line managers has been presented in Figure 5.4 in the methodology chapter. The questions in the interview focused on the kind of organisational support offered to expatriate academics once they take up their posts at the university, the challenges and opportunities they faced by having expatriate academics in their disciplines, the level of socialisation between local and expatriate members of staff, how to define the success or failure of the expatriate appointee in their discipline and finally their recommendations to improve the expatriate experience for both the university and the individual. In the section below, the challenges associated with the management of expatriate academics as perceived by the academic line managers has been presented.

8.2.1 Challenges associated with the management of expatriate academics as perceived by their line managers

According to the line managers of expatriate academics, the challenges that they perceived expatriate academics faced fell into two major categories, namely, external challenges and workplace challenges, as presented in Table 8.1 below. Each category of challenges are discussed in turn.

Table 8-1 Challenges associated with the management of expatriate academics as perceived by their academic line managers

	Themes	Sub-Themes	Frequency
Challenges	External	Immigration issues	9
		Accommodation/transport/banking	8
		Inefficiency/incompetence of government officials at Home Affairs	2
	Workplace	Language issues	6
		Lack of formal induction/orientation programme	6
		Cultural assimilation	5
		Incompetent HR administration	4
		Access research funding	3
		National versus international benchmarking	3
		Different training methods	2
		Student interaction	2
		Attitudes of permanent versus temporary staff	2

8.2.1.1 External challenges

Labour legislation in South Africa does not permit a foreign individual to work without first securing a work permit. Therefore, the university is unable to employ a foreign citizen without a work permit. So even though a foreign citizen may have been successful in being the candidate of choice for a position at the university, the individual cannot be appointed in a permanent full-time capacity until such time that the work permit is secured. Participant 5 explained, *“The one big problem for the expatriates is the work permit. That is why we try to find an expatriate who wants permanent residence to avoid the trouble ... and sometimes you don’t find the people”*. Participant 9 also supported this view as she stated, *“ It seems there is an enormous amount of struggle on the part of the academic to get the work permit ... it’s between HR and the expat and the department of foreign affairs but it seems the process is not as smooth as it can be.”* Line managers find themselves in the unenviable position of having an expatriate academic appointed as a member of staff, but due to the bureaucratic delays in securing the work permits of not having access to the labour of that staff member for sometimes six months up to one year. In these cases, temporary lecturers need to be appointed in the interim, these costs often having to be borne by the affected school. Once expatriate academics have been appointed in a permanent capacity by the university, another

challenge becomes the renewal of their work permits, as this is not a process which the university deals with; it is the individual that is responsible for this. Participant 7 explained, *“The renewal of the work permit is up to the individual ... some have to go back to their original countries and reapply ... it is much faster than doing it within South Africa”*. The implications for staffing are that, if the expatriate academic is not in possession of a valid work permit, he or she is not allowed to work, and therefore line managers have to make alternative staffing arrangements until such time as the incumbent is able to secure the work permit.

Line managers commented on the difficulties expatriate academics have when settling down in South Africa. Many have experienced challenges with setting up bank accounts; as a result, salaries were not paid on time because bank accounts were not open timeously. Participant 7 stated, *“When someone new comes in what is to be done and quickly do this otherwise you don’t get your salary in time if you don’t open your bank account ... if you are not told to open a bank account then you will never get paid on time and this is an inconvenience ...”*.

Challenges were also experienced in terms of transportation, that is, purchasing a vehicle or using public transport, finding accommodation near campuses and in safe neighbourhoods and finding schools for their children. Participant 11 explained that, *“Accommodation ... to buy a house is not cheap ... even to rent something is not very cheap ... transport ... well in Europe you don’t need a car ... here you need a car ... now where to take money immediately to buy a car ... cars in South Africa are extremely expensive.”*

The incompetence and efficiency of officials and processes at Home Affairs was highlighted as a major challenge. Participant 13 commented, *“People have had bad experiences with Home Affairs in terms of work permits inordinate bureaucracy ... huge forms to fill out ... slow processes ... no real contact person to find out the progress of one’s application, rigid interpretation of the rules that are often not really appropriate ...”*.

8.2.1.2 Workplace challenges

Six of the line managers agreed that a strong accent, foreign pronunciation of words and poor proficiency in English were major challenges they had to respond to when managing expatriate academics. Students complained about the strong accents of expatriate academics during lectures, with those academics from European countries as well as those from Asian

countries. Line managers explained that students are often second language or third language English speakers and therefore they themselves speak English with an accent. This makes it very difficult for them to comprehend academics with a strong accent due to their own pronunciation issues.

The problem is exacerbated by the lecturer's inability to understand the students' accents as well. Participant 12 explained, "*They know English perfectly ... very well but the way they speak (laughs) becomes a problem. The students don't understand them and he/she does not understand the student ... it does not work ...*". Participant 10 explained that in his school, there have been occasions when students have behaved in a "*slightly inappropriate manner*", making the academic expatriate the "*object of fun and derision*" even though his use of English was technically correct and his presentation was supplemented by visual aids. Participant 5 stated that management tries to overcome the accent challenge at the outset, during the interview stage by avoiding the situation: "*if they find that someone can't express themselves and their English is difficult we try to avoid that situation and we never had this problem where expatriates can't address the students*".

Another challenge that has presented itself is expatriate academics' proficiency in English. Sometimes because of the fact that English is not their first language, their understanding of the meaning of words and the use of words is not always correct. Participant 13 commented, "*Something that I have learnt is proficiency in conversational English is not always the same as proficiency in technical language and getting concepts across*".

Many line managers also commented that a major challenge for expatriate academics was the lack of a formal induction programme at the university. To date there has been no formal university programme aimed at acculturation of new academics and expatriate staff. Currently there is an induction programme run by the University Teaching and Learning office that focuses on teaching methodology and practice. Induction programmes involving administrative issues, research issues, walk-about, introduction to the university community at large and so forth is lacking although these are all issues that should be included in a formal induction programme. In terms of expatriate academics other matters like accommodation, transport, schools for children, immigration matters need to be included. Participant 8 stated, "*The university has nothing official and neither does the schools that I'm aware of ...*". Participant 13 explained, "*There should be some sort of induction process and very definitely is the one thing that does help people ... but the assistance with finding*

accommodation, to be put in touch with the right people for school for kids, assistance with knowing what is reasonable in paying for a second hand car... ”.

Participant 7 further stated that the university should be sensitive to the needs of expatriate academics as a category of staff and should do things that assist them adapt more quickly and feel more comfortable rather than leaving them to their own devices. Participant 11 believed that the reason why expatriate academics have a negative experience here is because of the cultural assimilation problem as well; he states, *“If the guy is academically sound and professional, then obviously the fail is obvious so then it’s very simple ... how can you adapt to a foreign country which many people can’t ... imagine someone moves ten thousand kilometres ... its er ... different habits, different styles, different climate, different everything ... ”.* Line managers also highlighted cultural assimilation as one of the challenges expatriate academics faced when working and living in South Africa. Not only did they have to adjust to the way things are done at the university but also within the community in which they lived. Being line managers, however, the challenges they faced when managing the expatriate academics often arose because of adjustment issues with the organisational culture. Participant 13 explained, *“If you are moving from one country to another particularly if it is a very different culture and language, you need that peace of mind that you will be taken care of in these practical issues.”* Participant 2 also explained that in her discipline, the school tries to provide this peace of mind by running a two-day workshop where the university practices and processes, organisational culture, ethos and benchmarking practices are explained to the new academics. This workshop is an important part of the cultural adjustment process for academic expatriates. Participant 6 supported this viewpoint as he explained that the most important issue for academic expatriates is *“getting familiar with the school ethos in terms of lecturing and type of assessment, interaction with students, the whole range of things that would be unusual or different to the expatriate coming in ”.*

Four line managers voiced their frustration at the incompetent and inefficient services offered by the HR division at the university especially when it came to assisting them in the management of expatriate academics. Participant 9 commented, *“I think our HR division needs to get its processes sorted out and to be probably a little more helpful towards expats ... ”.* Participant 11 expressed his frustration stating, *“It’s hard because the bureaucracy here I have never seen anywhere, its simply ... service departments here, they are not service departments, they behave to me like I actually report to them ... the Human Resources, they are actually ‘domkop’, they send me every day some request ... tell me how many staff you*

have? Who is retiring? This is information I will actually need from them.” Participant 7 explained, *“I think Human Resources ... the data base which they have, the record keeping is much in shambles and if you go there and ask for a support letter for my work permit they look at you and say we don’t deal with that, it’s not our business ...”*.

Another challenge faced by expatriate academics is the lack of access to research start-up funds. According to line managers, new academics regardless of whether they are expatriates or not are faced with this issue. The university does not have a research start-up fund for new researchers, who may not have access to funding in order to conduct their research. The avenues available to access research funding often involve lengthy application processes and delays between the application and the approval can be anything from one year or more.

Expatriate academics are then faced with the challenge of accessing funding in order to commence their research agendas. Research funding agencies like the National Research Fund (NRF) and Eskom do offer funding but again there are lengthy delays between application and approval. This is where academic expatriates and other new academics need to have access to a start-up fund that can bridge the gap until such time that the funding becomes available. Furthermore, funding from these funders and others like them is on a competitive basis and is open nationally; therefore competition is very fierce and there is no guarantee that the application will be successful. In any event, Participant 11 put it in plain words, *“It is important that at least for the first year they get something (start-up funds) because otherwise even if you are very good, if you have a fantastic research proposal, it takes a year before you get money because NRF, applications are through the year but for instance Eskom, I apply in July to Eskom and I get money in February ... so to bridge the gap you need some support from the university.”* Participant 4 elaborated further, *“There’s a chap in PMB that needed a lab because he can’t get going without a lab. Another chap needed a computer which he did not get through competitive grants; our researcher here just did not have the funds to get the software. She needed money for a conference, they come from an environment where it is normal to go all the time to conferences and when you here it’s every two years so the person is not plunged and isolated.”*

Participants 4, 10 and 12 have highlighted the challenge of national versus international benchmarking practice. Issues like simple day-to-day communications involving the sending and receiving of e-mails uses different etiquette internationally and nationally. One line manager (Participant 4) explained, *“The first day she said I emailed but I have got no reply*

and she was astonished because it is normal international practice to respond to an email the same day ...” .

Criticism of the university’s recruitment policy has also been leveled by some academic line managers. The main issue that they have is that the pre-requisites for the different academic levels are set too high compared to other national higher education institutions as well as to international norms. Participant 10 gave more details, *“What we expect of a ... particularly of a senior lecturer or Associate Professor or Professor is higher than, for example, what UCT would ... looked at CV’s of two Full Professors at UCT and Stellenbosch, they would not meet the minimum requirements for an Associate Professor post here because they don’t have enough qualifications ...”*.

He further commented on an incident he had with an applicant from the UK who wanted to know why he was rejected for a professorship post. Being the then Dean, he explained to the candidate that *“The selection committee felt that you probably applied one level too high, the second was that you don’t have enough publications, so he said, ‘Oh my goodness, in the UK I would be considered a very active researcher.’ So I sent him the job profile for the various grades and he was surprised to see what the numbers were ...”*. This problem has a direct impact on the ability of the university to fill posts, especially in the scarce skills disciplines where local skills are lacking and HR practitioners have to source talent from outside the country.

Another challenge that managers face with expatriate academics is that many have been trained or educated in different ways compared to their South African counterparts. In the more practical professional disciplines like medicine, different teaching philosophies exist so, for example, in the training of medical doctors one may find that in some countries their training is more theoretical than practical, while in others, like South Africa, the undergraduate training is more practically orientated. In Cuba, for example, medical students are trained theoretically without seeing any patients; once they qualify they immediately start specialising and seeing patients in those disciplines. Participant 13 explains that, *“Different paradigms or models are used in different countries ... Francophone countries can be different to Anglophone countries, so people trained in these countries don’t always fit in well with things the way those trained in Anglophone countries ... you may find a lecturer from the Congo operate very differently from ... Nigeria and Cuba of course”*.

There have also been issues in some schools where attention to detail has been a problem. For example, in the case of the structuring and formulation of examination papers and tests, there have been problems with editing and vetting of materials. Participant 10 expounded further, *“One external examiner said ... ‘what you sent me is nothing short of a dog’s breakfast ... I am not prepared to look at material that comes from your school again’ ...”*.

Line managers have faced embarrassing situations where students have challenged solutions to exam papers and it has been found that the students were correct in their query. In order to prevent this situation from arising in future, Participant 10 had to introduce in his school a *“hellava strong quality check”* and an internal moderation process by other staff who are familiar with the *“technical details of the material ... [to] pick up the discrepancies or anomaly ...”*.

Two participants, namely, 7 and 11, described the attitudes of some expatriate academics as problematic, especially if they were not in permanent posts. Those that are employed on a contract basis are less likely to be motivated and committed to their posts as they may not want to extend their stay here. On the other hand you may find those same incumbents trying very hard in their posts in order to have their contracts extended. Those that are in permanent posts have the attitude of making the best of things as they have already decided to stay indefinitely. Participant 11 also raised an issue with the securing of a permanent post in South Africa. He claimed it is too easy and commented, *“When you come here you almost immediately get a permanent post whereas in the States that’s so painful ... its actually close to impossible to get tenure ...”*.

A challenge at many South African universities is that expatriate academics are faced with diversity in the student body, not only in terms of race but also language, with second and sometimes third English language speakers, intellect, level of commitment, attitudes of students and large class sizes. Participant 1 made it clear, *“In South Africa we’re all about transformation and about access, they don’t necessarily understand that coming from their countries and so have different expectations of our students then they ought to have so it’s a question of making them aware of what our student body is and how they need to interact with them ...”*. In the next section, line management’s responses concerning the benefits and opportunities that expatriate academics bring to the disciplines have been presented.

8.2.2 Opportunities associated with managing expatriate academics as perceived by their academic line managers

Line managers identified a number of opportunities they have perceived when managing expatriate academics in their disciplines. These opportunities are directly associated with the workplace; therefore they can be classified as workplace opportunities. These include diversity, international networks and collaboration on research and teaching, innovation and creativity, provision of scarce human capital, curriculum development with an international flavour and the opportunity to progress rapidly on their academic career path.

Table 8-2 Opportunities associated with managing expatriate academics as perceived by their academic line managers

Theme	Sub-Theme	Frequency
Organisational Opportunities	International experience	7
	Curriculum development	3
	International networks/collaboration	2
	Scarce human capital	2
	Career progression (work hard, be competitive)	2

Seven participants agreed that the difference in perspectives, life experiences and standards of practice that expatriate academics have, enriches the teaching and learning experience for both students and local academics. Participant 1 put in plainly, *“The fact they bring in the different perspective as well from their countries is also useful to us, I think it opens the eyes of the students they interact with when they talk about what happens in their countries and it opens the eyes of the academic as well ...”*. Participant 5 further elaborated, *“Certainly when you take these people they come with completely different skills and ideas. They come with a lot of experience especially in their research ideas and they are able to open new fields you know so that’s the main advantage”*. From an academic perspective, expatriate staff bring in new ideas which help eliminate stagnation and introduce local staff to international experiences, thus introducing new creativity and innovation into both teaching and research. Participant 8 explained, *“As an academic it is always very important in my view to get staff who have a broad range of experiences, especially staff coming from outside of SA or PMB or the UKZN environment. They bring new ideas, different ways of doing things, they bring new experiences ...”*. Therefore the international experience of expatriate academics is an invaluable asset to the school within which they are located at UKZN.

According to line managers, curriculum development is greatly enhanced by having academic expatriates in the discipline. Expatriate academics that have international experience in both teaching and research help to create an internationally acceptable curriculum for local

students. Having academics that have been trained internationally also helps to create the kind of curricula for local students that are aligned with international best practice. Participant 12 stated, *“If I take the example of myself, I studied in Ghana, Toronto, Denmark, Holland ... it’s the exposure I have had ... it gives me confidence that what I am doing here is at an international standard ... many of the staff have had similar experiences so you can say that we are able to maintain the standard that is acceptable internationally for instance we developed the curriculum here and we had an accreditation visit ... and when the guy saw our curriculum he said “Ah, exactly what we teach our students ...”*

Three participants acknowledged the valuable networks and collaborative research opportunities that expatriate academics bring to their discipline because of their international exposure. Participant 5 put in plainly, *“They also have contacts that can assist both at teaching levels and research. They open new fields to you”*. Participant 1 agreed and stated, *“I just had this experience most recently arranging an international conference ... we need to get Africans and then clearly the lead people in sourcing us these African academics will be South Africans and I said No, we don’t know much about the rest of Africa, we’re quite insular here ... we know more about Europe and America so in that sense they add a lot of value ...”*.

In some disciplines, expatriate academics are invaluable because without them many programmes would be understaffed and this would thus comprise teaching and learning and in some instances bring about a complete shutdown of the academic department. Participant 11 states, *“For us it’s actually desperation otherwise we would actually close (laugh)”*. Participant 1 supports this viewpoint by stating, *“Definitely scarce skills, we have this interesting situation, when we advertise posts in Durban like the last time we advertised a few posts, we had 40 applicants, 10 were South African. OK, we advertised the same post in Pietermaritzburg, we got 10 applicants, no South Africans OK (laughs) ... because they willing to work on our so called rural campus as we refer to Pietermaritzburg ...”*.

Academic line managers saw the clear career trajectories and support by management and government for research as opportunities that expatriate academics value at the university. Participant 11 explained, *“If they work really work hard so they have a very good opportunity to ... er ... set up a nice academic career and the reason is that there is a big scarcity of chemical engineers not only in academia but in the country ... the competition is far lower ... so if you really want to perform ... it’s up to them ...”*.

8.2.3 Recommendations to improve the expatriation experience

Academic line managers made the following recommendations to help improve the expatriation experience for both the expatriate academics and the institution (see Table 8.3).

Table 8-3 Recommendations on how to improve the expatriation experience for both the expatriate and the institution

Recommendations	Frequency
Induction/Orientation	9
Improve service delivery at Home Affairs and Human Resources	6
Improve recruitment processes	4
Creating an International Office/Specialists HR	3
Access to start up funds (research, travel etc.)	3
Social interaction (staff club, socials, get-togethers)	2

Academic line managers agree that once the candidate assumes duty, the university should provide an induction programme where he or she is introduced to the various processes and procedures at the university; this should be done by the HR department. This induction programme should cover important aspects that every new employee should know including how to access research funding. Participant 14 called for, *“workshops for expatriates or in fact new academics. More workshops from HR, explaining the conditions of employment and how the university functions. I think one needs a more formal structure to inform them quicker ...”*. Participant 6 supported this by indicating the need to *“clearly improve orientation with focus on where they’re coming from rather than just saying well this is a generic, I think one could do that better in reaching out to them rather than just saying welcome here, here we go. Mentorship programme as well ...”*.

Home Affairs, the government department that is responsible for the immigration process, needs to become more efficient and effective in its service delivery. Participant 13 explained, *“What happens before they come is of course out of our control but somehow making the process of applying and being appointed as simply, easy, friendly, hospitable as possible and again at the medical side that breakdowns very very badly ... er ... People have bad experiences with Home Affairs in terms of work permits and what have you, they very bad experiences with the Health Professionals Council in terms of having their regular degrees accepted ... inordinate bureaucracy ... huge forms to fill out ... slow processes ... no real contact person find out the progress of one’s application, rigid interpretation of rules that are often not really appropriate... so much ... while they excuse the university in all of this...”*.

During the recruitment phase of the process, academic line managers suggested casting the search wider from the early stages, especially in the scarce skills disciplines. Participant 10 explained, “*If you have an advertising window of 3 weeks, your advert is not going to be read by anybody so we would often insist that HR extend that window so we could advertise on JOES, EJOES and there is another one ... so we were very keen to ... to widen the catchment area, to widen the window and we often insist even if we at times did at our own cost using some of our private resources, we’ll pay for the adverts and we’ll pay for the extension but let’s ... let’s rather wait so we can have a longer ... er ... larger catchment area, that’s been successful in part ...*”. Line managers commented that HR should be more efficient and aware of the retirements, resignations and terminations in the disciplines and should therefore begin the whole search process much earlier to avoid lengthy absences from the classroom and gaps in teaching practice when one academic has left and they await the arrival of another.

In order to overcome issues of language proficiency or pronunciation, early detection of the problem during the interview stage of the selection process is recommended. Participant 10 recommended that “*you have a prior check and that is that you actually heard a presentation from that person either face to face or where you can see the face, you know is not a substitute person that they having over a speaking trumpet, it is the person that you are going to employ and you either do it face to face in the same room or via video link which is pretty good and it’s a relatively minor cost and if you do that you cut through many of the problems.*”

Academic line managers also recommended that the HR division of the university should also have a dedicated division to deal specifically with expatriate academics and their issues such as work permits, letters of employment, service records, so that they can provide a more customer friendly environment and make the transition smoother. Suggestions were made to create an International Office for staff as the institution has done for international students. Participant 12 stated, “*I think there should be a unit in the university that assists them when they come to know the town and to assist them to settle, you need a unit like that and therefore they can focus their mind on work almost immediately ...*”.

Academic line managers also recommend access to start up funds for new academics, be they academic expatriates or local academics, so that they may start their research activities while waiting for more formal means of funding. Participant 10 explained, “*To me there should be*

some kind of money from the university that will actually help them to start, maybe you don't have to pay them an expatriate allowance but a once off amount that will actually help them to start ...".

A further recommendation was that the university develop a more social organisational culture, instead of operating in the insular environment that currently exists. The creation of a staff club, whether discipline specific, college specific or university wide in order to create a supportive environment would be crucial in creating a warm and welcoming environment, where when people come to the university they feel at home. This would aid the reputation of the institution and attract talent here. Participant 12 explained, *"We are also missing, we had a staff club somewhere here ... its dead (laughs)... it will help them in terms of their social activities but it's gone. What I am impressed of is actually the students ... I see the Nigerian students, they've organised themselves on a Sunday you come here to Chem A, there is a lecture room called Chem A and it is very lively, they have a church, they have church that is going on ... for hours and they are singing and they are drumming ... I came one day and I said what's going on here (laughs) ... something like that, it helps ... it helps and then you see they don't have to go into the city..."*. Participant 1 indicated that as South Africans we tend to become focused on diversity in our own country and tend to ignore the diversity that exists on a global scale. He stated, *"We're so caught up in our diversity here in South African that we don't really have an international day within the school or the university or something like where people could talk about their lived experiences overseas and here, I think that would be one step ... I think doing it university wide ... I think is perhaps too broad and you won't really get much interaction with people but I think schools need to start taking this more seriously and you know, broader than just academic ... taking on the international aspect of student and staff life and trying to celebrate it so to speak..."*.

This section has sought to present the challenges and opportunities perceived by academic line management who have expatriate academics in their schools. The challenges were classified as external challenges and workplace challenges. The discussion of external challenges examined the perceptions of line managers regarding the challenges expatriate academics faced in terms of meso-level challenges like immigration issues, settling in and an inept bureaucracy at the Department of Home Affairs. The discussion of workplace challenges examined the perceptions of line managers regarding the challenges expatriate academics face in the workplace. It also described the challenges that line managers face in managing expatriate academics in their schools. The opportunities as perceived by their line

managers presented by having an expatriate academic as a member of staff were also examined.

This next section analyses HR specialists' perceptions of the challenges associated with the attraction and retention of this valuable human capital.

8.3 Challenges associated with the attraction and retention of expatriate academics as perceived by Human Resource specialists

The South African higher education sector is facing a serious skills shortage in part due to the imbalances in our political and educational past and also to the challenges of being a newly created democracy. The sector has been challenged by changes in the higher education landscape both in terms of legislation and restructuring.

This section presents the findings for research objective 11, from interviews conducted with nine HR specialists, namely, managers and senior consultants, which provides an important analysis of the perceptions that employers have of the challenges they face when trying to address the skills shortage in our country by bringing in expatriate academics in order to facilitate teaching and learning mainly on our scarce skills programmes like the sciences and engineering fields. All the HR specialists interviewed were female, with three being senior HR managers in the Colleges of Agriculture, Science and Engineering as well as the Health Sciences. Six HR specialists were senior HR consultants from the College of Law and Management Studies as well as from the university HR division, namely, the benefits and compensation, talent sourcing and recruitment and selection sections (refer to Table 5.6 in the research methodology chapter).

The interview schedule (refer to Figure 5.3 in the research methodology chapter) used to question HR specialists focused on the recruitment and selection processes employed by UKZN when recruiting expatriate academics, the organisational support processes in the place for expatriate academics, and the reasons why expatriate academics select UKZN over other universities in South Africa. The interview questions also focused on on-boarding processes and policies adopted by UKZN, the challenges associated with managing expatriate academics why expatriate academics are used at UKZN and how best to ensure the success of the appointment of the expatriate academic.

A thematic content analysis was carried out and themes identified which are presented in Table 8.4 below.

Table 8-4 Challenges associated with the attraction and retention of expatriate academics

Themes	Sub-themes	Frequency
External challenges	Immigration issues	9
	Workplace legislation	5
	Skills shortages	5
	Verification of qualifications	2
Workplace challenges	Lack of formal induction/orientation	3
	Nature of the teaching environment	3
	Access to research funding	3
	Compensation and benefits	2
Personal challenges	Personal finances	8
	Family matters	5
	Socio-cultural adjustment	4
	Safety and security	3
	Language	2

8.3.1 Challenges associated with the attraction and retention of expatriate academics

According to HR specialists there are three major challenges associated with the attraction and retention of expatriate academics. These are external challenges, such as workplace legislation, immigration issues, skills shortages, verification of qualifications and a lack of a formal induction or orientation at the university. The next major challenge expatriate academics face is in the workplace; issues such as the nature of the teaching environment, compensation and benefits and access to research funding fall into this category. Finally, according to HR specialists, expatriate academics face personal challenges, namely, safety and security, financial issues, family matters, language and cultural adjustment. Each of these major themes is discussed in the following sections.

8.3.1.1 External challenges

All the participants agreed that the biggest challenge associated with the attraction and retention of expatriate academics was the current immigration policies and procedures regarding the procurement of a work permit with its lengthy delays and bureaucratic processes. Every foreign citizen who wishes to work in South Africa needs to apply to Home Affairs for a work permit. Participant 1 explains, *“I can understand there is a lot of documentation required. It’s quite a time consuming process and [Home Affairs] have changed the process of processing them in SA, where it used to be done locally now it goes to Pretoria. It’s been very problematic.”*

Three senior HR consultants (participants 7, 8 and 9) also commented on the fact that in the past they were able to form relationships with Home Affairs staff in Durban, who would expedite the process, with turnaround times of no longer than one week. The process now can take anything from three months to six months and in some cases eighteen months. This becomes a major problem at the university as positions are left vacant until such time that the new appointee assumes duty; thus other staff members have to carry the burden of additional work, as teaching and learning need to continue. From a legal perspective, no one is allowed to work in South Africa until they have a valid work permit. One senior HR manager indicated that in the letter of contract, the university clearly stipulates that the incumbent is not to resign from their current post until that person is in possession of a valid work permit, as the university does not pay them during the duration of the waiting period.

Participant 5 states, *“In some instances some schools wait for those individuals, in other instances they cannot wait because they compromise their curriculum teaching and their student delivery ... in some instances ... rarely but we have had it where we say if you cannot assume duty by, and put that in our letter, a particular date we will have to withdraw the offer”*.

Participant 9 also indicated that there is no warning system that alerts the employer that the work permit is near expiration for expatriates, and UKZN has had experiences where expatriate academics have not informed the university when their work permits have expired due to the tedious bureaucratic processes involved in reapplying for a work permit from South Africa. She said, *“The process is no longer done on a regional level, it’s done on a national level so you are now on a queuing system so ... I think another challenge is that there isn’t any specific person that can tell you in an automated fashion that the person’s visa has expired.”*

Of the nine participants interviewed, five (participants 4, 5, 6, 7 and 9) saw workplace legislation as a challenge to the attraction and retention of expatriate academics. They stated that, according to South African legislation, South African citizens were given preference with regard to employment and UKZN’s recruitment policy reflects this. Senior HR managers (participants 1, 2, 3) reported that it was mainly in those areas specified as “scarce skills” that expatriate academics were employed by the university, as legislation prohibited the hiring of an expatriate academic should a South African academic be able to provide the skills required.

In any event, participant 8 explains, *“The recruitment policy states ... appointable designated candidates, South African citizens shall be granted preference for vacant posts at the university. We want to give preference to South African’s first ... it’s only scarce skills that we will look at foreigners but we try to instill that South Africans do come first, job creation for them first.”* Participant 5 added, *“The policy first says that we must look at our South Africans and we do actually short list them, all South Africans and non-South Africans, then if amongst the shortlisted people we have South Africans then we have to look at them, interview them and if we can’t get anything from them then we get foreigners”.*

Participants 1, 8 and 9 indicated that there would be no demand for expatriate academics if there were not a critical shortage of South African skills in certain areas, like the sciences, mathematics and engineering disciplines. The consultants explained that expatriate academics filled a gap in our higher education system which without them would have suffered a breakdown in delivery of educational programmes. Participant 1, a senior HR manager, explained, *“Many people look at our website and for our scarce skills areas, our selection panel, particularly our leadership will approach people overseas, inviting them to apply. Sometimes we go into search mode even before the advert is closed maybe because the leadership has heard of someone who wants to come back”.* Another senior HR manager, Participant 3, stated, *“For senior posts like associate professor and senior professor we advertise in the international media, usually for Engineering and Computer Science ... we struggle to find suitable candidates in South Africa.”* The consultant goes on to say, *“We have posts sitting vacant from 2010, so we put them into search mode, we go through to our international adverts bearing in mind that we have a number of South Africans abroad and in fact in some of our posts we have actually had South Africans return ...”.*

A senior HR consultant, participant 4, reported that it takes a long time for expatriate academic qualifications to be verified by the South African Qualifications Authority (SAQA). Sometimes the university has no choice but to appoint the person in the position before their academic qualifications can be verified. In some cases it is only during disciplinary hearings with these academics perhaps a year to six months later that it is revealed that they do not have the qualifications they claimed to possess. She explains, *“... Here the only problem that we had in our college with expatriates in terms of work now and maybe leaving, the only reason they’ve been leaving is because of the qualification’s ... er ... we’ve been having trouble with....it’s difficult to verify qualifications of people abroad....it difficult, it takes long in such a way that we even appoint someone and we still haven’t verified ...”.* Participant 5,

an HR consultant for the same college, states, *“Most cases that we’ve had ... disciplinary cases we’ve had are from people that are from abroad that we haven’t been able to verify and when it comes back later we find that they do not have those [qualifications]”*.

8.3.1.2 Workplace challenges

Participant 3 reported that at the time there was no formal induction run by UKZN for new employees. Any orientation or induction to the workplace was done on an ad hoc basis and not spearheaded by the HR division of the university. The informal orientation was handled by the individual schools often at the discretion of the heads of school. She commented, *“There isn’t an official programme or induction in the university on a general basis. Some faculties do have their own kind of mini induction, not specifically for the overseas candidates in general. I know periodically in my college I will run something for them as well. I will be honest, not as often as it should be done. Health Science has also run that ... In her college it’s done in the faculty and I think obviously for an overseas individual you would depend quite a lot on the actual faculty and the school itself and colleges may in cognate disciplines or whatever to kind of orientate.”*

Participants 8 and 9, both senior HR consultants, explained that there were plans to revive the formal induction programme at UKZN, but it would be for all new employees not only foreign staff. This programme would involve a buddy or mentor from HR to assist with settling-in issues like opening bank accounts, renting and/or buying a house, renting and/or buying a car that would be consistent across all colleges. Participant 9 states, *“The next step would be an employee induction that’s consistent throughout the colleges which I said to you yesterday which is the buddy system where the foreigner or new recruit is given a buddy for the day or for a few days that will be able to take them to the bank to sort out a bank account so that they left alone and they not like a fish out of water, they don’t know what to do ... so induction programme-buddy system”*.

HR specialists highlighted various challenges faced by academic expatriates in the workplace. They stated that the working conditions at UKZN could be challenging when attracting and retaining expatriate academics. The large class sizes and the quality of students, the attitude of students toward their studies and the expectations they may have in terms of teaching practice and tools available to them may prove too challenging for some. The unavailability of proper facilities to conduct field work and continue their research interests also form part of the challenge that working conditions present. Participant 7 states,

“If you get somebody from a country like, let’s say, Korea ... students are very competitive and well prepared ... now if you come from that kind of background here there will be a problem”. Participant 5 states, *“Even when we are doing the interviews we ask them what they would do if they find a large class with students who are at completely different levels ... this is the South African situation”.*

Three senior HR specialists (participants 1, 2 and 3) from the colleges that include the scarce skills disciplines at UKZN explained that expatriate academics often find it challenging starting their field work when they first get to the university as they do not have access to dedicated research funding. All research funding is allocated on a competitive basis where researchers, both expatriate and South African, have to apply for funding from sponsors, such as the NRF. This is often a challenging process, not only in terms of procedure but also because competition is very stiff as funding is limited. Often expatriate researchers and other new researchers need millions to set up their laboratories in order to conduct field work. One senior HR manager (respondent 1) put it plainly, *“There’s no special attention given to a foreigner that we wouldn’t give locals, so basically for all permanent staff, if they got specialised skills, if there are areas we want to retain in terms of research productivity through the research office, they have research driven incentives for academics ... so not through HR, it’s actually through the research office ...”.*

Funding incentives are also driven by performance, in line with UKZN’s new Talent Management programme, which once again is aimed at the best performers, regardless of where they come from. Participant 2 added, *“I am not aware that there is something specifically for them, but you know there is this whole talent management thing we’re unfolding, that will be for all academics, we would like to retain all our good staff especially our good staff so whether you are an expatriate or not ...”.*

Two senior HR consultants (participants 8 and 9) reported that the compensation and benefits packages offered by UKZN are not attractive enough to entice many expatriate academics from Western countries; because of the foreign exchange rates, they are not competitive on the global market. However, these compensation and benefits packages do prove attractive to expatriate academics from other African countries, the Middle East and India and other Eastern countries. Participant 8 explained, *“Salary plays a very, very big role in attracting people ... the downside is we don’t always match the salaries especially if you coming from the US, Canada ... er ... it might work for people who live in Dubai, India...”.*

8.3.1.3 Personal challenges

HR specialists reported that there were major personal challenges faced by the academic expatriate, namely, personal finance, family matters, cultural adaptability, safety and security and language issues.

A number of consultants reported difficulties with securing finance for expatriate academics as being a challenge. This was then confirmed by senior HR managers, who stated that, due to the new Financial Intelligence Centre Act (FICA) registration legislation, opening a bank account and securing finance to purchase a vehicle or home was proving to be problematic for expatriates. Previously the university assisted with the processes but they are not a registered financial institution, so they cannot be surety for any finance that expatriate academics may apply for. Participant 7 explained, *“They can’t get a car because they don’t have a credit history ... we used to help them out, university has a scheme with ABSA but that’s been stopped because of the FICA thing, we are not a finance credit provider ...”*.

Participants 1, 2, 3, 6 and 7 reported that family matters were a major concern when attracting and retaining academic expatriate staff. The candidates were greatly assisted by UKZN during the on-boarding phase with arrangements regarding their families. If these new employees were bringing their families to live with them in South Africa, then the university would assist in the following manner: they would organize flight bookings for both the new employee and their families; they would assist the new employee with location of schools in the area around campus where the person would be located; they would even go so far as to pay for two school uniforms per child; they would provide a list of accredited estate agents to contact for rental properties and bed and breakfast establishments in the area, near the campus where the person was to be located; the university would also pay for the employee and their families visas. The university also paid for shipping costs of furniture and cars according to the level of position the employee is being appointed at. The assistance offered by the university is guided by the relocation policy of the university; this policy applies to both foreign and local employees who have to relocate in order to take up employment at the university.

Participant 6, who is in charge of benefits and compensation, explained: *“We make flight arrangements, we find the appropriate time and date. If he is coming with his family, how many of them, we give the details to the travel office. There is a process we have to do and so*

on. They will have to set date and time and so on and get back to us and we will get back to him and tell him everything has been confirmed and you can come down and what have you, but in some instances some of them want to come down with their family as well as the personal effects so we also do the relocation simultaneously if they also want to do that. In that instance the university's policy is that we ask them to get three quotes. In our letter it states that you need to get three quotes, from Stuttafords, Freight Line and Biddulphs. Those are the three people we use now and of course we use the cheapest of the three. So they get in touch directly with these people. I think these people are based in every country so they get the quotation and send it to us via email. We will look at it, look at all the nitty gritty and then once we're happy with that, we would choose the cheapest quote and we would send it via the I-Enabler to the procurement office. We tell the staff member it has been approved, you can move your stuff once the arrangements have been made between the removable company and them."

Participants 1, 3, 4 and 9 reported that it was candidates' ability to adapt to their new environment that posed one of the biggest challenges to the expatriation experience. According to these specialists, how well the candidate adjusts to their new work and living environment seems to be critical to how successful the expatriation experience of academics is at the university. Participant 9 reported, *"I would say, in my opinion, it would be the attitude or adaptability of the individual themselves. I would imagine that before they make such a serious decision to relocate that they thought of all those things. Perhaps it different when you get here and in a way I think that possibly it is kind of the support and maybe the welcomings of the immediate community that you are in. That's what I would say."*

Issues around safety and security in South Africa have presented a major challenge to the attraction and retention of expatriate academics. International media reports have portrayed South Africa as a violent country, so foreigners are often wary and sceptical about coming to live and work here. Participant 9 explained that academic expatriates are often unaware of personal security and safety and exposed themselves to opportunistic and petty crimes, like muggings and hijacking. She explains, *"The one guy ... on one occasion got his car stolen and he was stranded ... another guy got mugged walking in Grey Street talking on his cell phone ..."*

Participants 4 and 5, senior HR consultants, reported that they found language to be a major challenge throughout their experiences with expatriate academics. One consultant commented that during the interview phase, she had experienced difficulties in understanding what the candidate was saying as his accent was very heavy and she had thought it impolite to constantly interrupt the candidate to verify what he had said. *“The ... sometimes it’s difficult to understand a foreigner ... OK so the language ... sometimes, so the accent is very heavy, so you find yourself trying to be as professional as possible not wanting to ask individuals to repeat...”*.

Participant 8 reported an incident where she herself was a student and could not understand the lecturer because of his heavy accent and level of proficiency in English. An accent often causes students to struggle with understanding as English is often not the student’s first language either. She comments, *“The challenge is that, maybe because I’m speaking as a past student here, is that the language barrier is a problem ... their first language is not always English and for instance I had a ... I was doing Maths and Stats and that alone is Greek and the lecturer was Greek literally (all laugh) and his first language was Greek and we ... it was Greek in both ways (all laugh) and as students we couldn’t understand him at all ... we just couldn’t Understand Him AT ALL ... so that’s the challenges that the students face is that their first language is not always English and that does pose a barrier because you can’t always ... like you thinking it but can’t get it through to the students...”*.

8.3.2 Factors associated with the attraction and retention of academic expatriates

Respondents were asked to identify factors that would attract academic expatriates to the university. The organisational factors that were identified were the reputation of the university, its research driven ethos, the comprehensive relocation policy and the geographic location of the university in the province of KwaZulu-Natal, as presented in Table 8.5 below.

Table 8-5 Factors associated with the attraction and retention of expatriate academics

Themes	Sub-theme	Frequency
Organisational factors	Relocation policy	9
	Location	3
	University reputation	2
	Research driven ethos	2

Participants 1 and 2 feel that the reputation the university has in terms of its position on the world rankings is a factor of attraction. Participant 1 explains that *“it would be the*

reputation of the university, reputation of the college and perhaps of the specific discipline” that attracts staff to the university. Participant 2 adds, “The university has an excellent reputation especially within the world rankings of university ... has a high reputation ... academic reputation and it’s known for being research driven ... its research ethos.”

Each individual college HR division is responsible for the recruitment process right until the offer of employment is made and thereafter they hand over to the Benefits and Rewards section in the HR division of the university. The university policy on relocation expenses that the university pays for is encompassed in Section 23 of the Conditions of Service Policy: Relocation Expenses on Permanent and Long Term Fixed Term Appointments and Re-Deployment of Staff to another center (2012:1). Participant 8 explains, *“Our benefits for foreigners is probably the best in the country ... seriously.”* Participant 7 explains, *“We pay for all your applications, you can claim for just about anything that you incur during the whole relocation process ... I think it is a percentage of your salary.”*

The university is located in the province of KwaZulu-Natal, with campuses situated in Durban and Pietermaritzburg. The city of Durban is on the east coast of South Africa while Pietermaritzburg is located in the midlands of the province. Thus, according to respondents, the climate, location and ambiance of the city attracts expatriate academics to the university. Participant 8 explains, *“It’s going to be for different reasons, for instance, why do people apply to UKZN as opposed to UCT ... it could be location, so geography plays an important role, it could be climate ...”.*

8.3.3 Recommendations to ensure the success of the expatriation experience

HR specialists were asked to make recommendations for ensuring the success of the expatriation experience for academic expatriates. Recommendations made could be grouped into three major categories, namely external, organisational and personal recommendations as indicated in Table 8.6 below.

Table 8-6 Recommendations to improve the expatriation experience

Theme	Sub-theme	Frequency
External recommendations	Immigration issues	5
Organisational recommendations	Official induction programme	6
	Mentorship/buddy programme	3
	Online self-help HR portal/website	3
	Verification of qualifications	2
Personal recommendations	Cultural adaptability	4

External recommendations include ways of improving all matters concerning work permit applications and eliminating the lengthy delays and bureaucratic processes involved. Participants recommended that the processes at Home Affairs become more user-friendly and that the turn-around time in processing visas and work permits be made more efficient. Participant 4 commented, *“I don’t know if something ... done to fast track the applications by the embassy and all those authorities that it has to go through, otherwise it can be smooth ...”*. Participant 3 also recommended the use of corporate visa applications which would help to expedite the work permit application process. She explains, *“Home Affairs told her that we can look at corporate visa’s ... its quicker ...”*.

The majority of respondents recommended that the university adopt a formal induction programme for all new staff, including academic expatriates. This programme should cover all aspects of the workplace, including conditions of service, processes and procedures at the university as well as an introduction to the organisational culture of the university. Participant 1 explains, *“We need to do a more proper formal induction process and I think particularly going into the new colleges or the new schools ... I think HR can only do so much ... I think there is a responsibility in the colleges and schools ... to lend that support ...”*.

Participants 1, 8 and 9 recommend the adoption of a buddy system in order to make the academic expatriate’s experience more rewarding. Participant 8 explains, *“... in terms of this whole thing about orientation and the buddy support system and talking them and showing them around and where do they stay, where do they bank, where do they school?”*

Participants 7, 8 and 9 recommended the creation of a website especially for foreign staff where all the relevant information required for settling in is contained. Participant 1 stated, *“We are going to hopefully implement this, this year ... a foreigner’s website which basically gives you everything you need to know as a foreigner, which banks to go to ... er ... the restaurants, the shops, the climate ...”*.

Participants 4 and 5 also recommended that there be a mechanism in place in order to verify that applicants’ qualifications are in line with South African qualifications before they come to take up employment in South Africa. Participant 5 explained, *“I don’t know if a person can come here if they are accepted, there is a way that they can bring some certification from their side to say that this person really has the qualification’s before we even have to wait for*

ages to have that information and also how do we ensure that this thing is certified by the right person ... it's legal".

Personal recommendations involve the incumbent's being cultural adaptable and being open to new experiences and change. Participants 1, 8 and 9 recommend that the individual be culturally adaptable and flexible in order to be successful in the expatriation experience. Participant 1 reports, *"I think its individual....it's got be whether they actually fit into the culture, there's a lot of lecturers that leave soon after coming here because they don't like the country, the environment or something that they not happy with , more money somewhere else"*.

8.4 Conclusion

These findings have provided the views of academic line managers at UKZN. This sector is relatively under-researched with regard to management practices. Recognising the demands faced with regard to management of expatriate academics, it could be concluded that managers in this sector are trying to understand the challenges and opportunities they face in their operations. It is also evident that there is room for further progress in this area if highly skilled staff members are going to be retained here. The findings of this phase of the study should assist other academic line managers to identify and benchmark their progress in the context of changing external conditions.

This research has also provided the views of senior HR managers and consultants at UKZN. With regard to the demands faced with regard to the attraction and retention of employees, employers in this sector are clearly trying to understand the challenges they face in their operations. Here too there is room for further progress if highly skilled staff members are going to be attracted to this sector and retained. These findings should assist other higher education HR managers to identify and benchmark their progress in the context of changing external conditions.

As this study has a mixed methods research design, in the next chapter a synthesis of the findings from Phase 1, 2 and 3 are presented. This is done in order to identify the themes associated with the international career experiences of expatriate academics at UKZN and SA.

Chapter 9

Discussion of Results

9.1 Introduction

As this study adopted a mixed methodology research design, this chapter serves to integrate the findings for the three phases in order to discuss the themes that have emerged through this research. Firstly, Phase 1 of the study was made up of the secondary data collection phase, where the staffing trends of academic staff at SA higher education institutions were examined. SA higher education institutions consist of a large number of publically funded and privately funded institutions. For the purposes of this study, the focus is on the 23 publically funded universities and technical universities and colleges.

Secondly, Phase 2 of the study was made up of the quantitative study, where the “The Career Experiences of Expatriate Academics at UKZN” questionnaire was distributed to expatriate academics at UKZN. Finally, Phase 3 of the study was made up of the qualitative study where interviews were conducted with academic line management and HR specialists concerning the challenges and opportunities of managing expatriate academics. As this study adopts a mixed methodology, themes are used in the discussion of the results so that a integrated interpretation of the complexities of the results can be achieved. Taking the conceptual framework, aims and objectives of the study into consideration, the following themes were identified in order to provide an in-depth discussion of the findings of this study:

Theme 1: Staffing trends amongst academics in SA higher education institutions

Theme 2: Staff and skills shortages in SA higher education institutions

Theme 3: Academic mobility patterns amongst expatriate academics at SA higher education institutions

Theme 4: The motivation to relocate among expatriate academics at UKZN

Theme 5: The career orientation of expatriate academics at UKZN.

Theme 6: The international career experience of expatriate academics at UKZN.

A discussion of the findings under each of these themes and their related sub-themes is undertaken, referring also to previous studies to support or show variations in the interpretations of phenomenon under investigation.

9.2 Theme 1: Staffing trends amongst academics at SA higher education institutions

This theme served to focus on the staffing trends amongst academic staff at SA higher education institutions for 2005/2010/2012. The intention was to establish the proportion of expatriate academics versus SA academics and to highlight the differences or similarities between the two groups across age and gender amongst all higher education institutions in SA including UKZN in Phase 1 of the study, this served to provide empirical evidence for macro-level analysis in the conceptual framework in Figure 1-1 . The sample of expatriate academics at UKZN was further examined in Phase 2 according to the following demographics: marital status, number of dependents younger than 10 and those older than 11 years old, location of expatriate academics' family, duration of expatriation experience, occupational history, type of employment contract, length of academic career.

A comparison of the ages of SA and expatriate academics in Phase 1 indicated that in 2005 there were no significant age differences between these two groups (see Table 6.8). However, for 2010 and 2012 there were significant age differences, where the average age of SA academics was higher than that of expatriate academics. Expatriate academics' average age over the three years ranges from 44.03 to 42.90 (see Figure 6.1). The youngest expatriate academics over the three years were 24 years old and the oldest range from 65 to 70 years old. This finding corresponds to the characteristics of SIEs identified by Suutari and Brewster (2000) where SIEs were generally slightly younger than their local colleagues. At UKZN, in Phase 1 of the study no significant differences amongst the average ages of SA and expatriate academics were found. However, the average age for expatriate academics was lower than the national average for 2005 and higher for 2010 and 2012. The majority of expatriate academics (39.1%) at UKZN in Phase 1, fell into the 40-49 year age group, followed by those in the 50-59 year age group (See Table 6.11). Respondents in the sample in Phase 2 of the study reflected this pattern too as the majority of the sample fell into the 41-

50 year age group; in contrast to the institutional trend, the 36-40 year age group were the second largest age group in the sample.

When comparing the gender of SA academics versus expatriate academics in Phase 1 (see Figure 6.4), results showed that there have been significantly more males than females among SA and expatriate academics for 2005/2010/2012 across all SA higher education institutions. In the SA context, amongst SA academics these findings bear testimony to the fact that, twenty years into democracy, SA was still struggling to address the gender imbalances of its past, where women were not part of the traditional economically active population and where their social roles as wives and mothers defined their social identities and they did not have access to education. The trend amongst expatriates is seen in Figure 6.2 and was indicative of the gender bias pointed out in migrant and expatriate management literature (Selmer and Lauring, 2013a; Altman and Baruch, 2012; Aycaan and Eskin, 2005) where it was shown that individuals who move to another country are traditionally male due to pre-existing social differences between genders. These findings were in contrast to the findings of Suutari and Brewster (2000) who found that SIEs are mainly females. It is important to note the context of Suutari and Brewster's (2000) study as their sample was from European countries, unlike the current study.

UKZN showed that its efforts in transformation have paid off as there are more female SA staff employed than SA male staff over the three years (See Table 6.9). However, the majority of expatriate academic staff employed at UKZN over the three years were males. Despite this, there has been a steady increase in the number of female expatriate academics employed at UKZN over the three years (see Table 6.9). This finding was consistent with the national trends in terms of gender, where more expatriate male academics than female academics are employed at SA higher education institutions. The respondents in the sample in Phase 2 also reflected the national and institutional pattern of gender bias in favour of male academics.

Respondents in the sample in Phase 2 were further analysed in terms of marital status, number of dependents, the ages of those dependents, the location of the expatriate academics family, the duration of the expatriation experience at UKZN, the occupational history of expatriate academics, current residential status and type of employment contract at UKZN as well as the length of their academic careers. This was done in order to validate the characteristics of SIEs that expatriate academics in the sample demonstrated.

The majority of the respondents in the sample in Phase 2 of the study were single (54.2%) and this reflected the characteristics of SIEs presented by Suutari and Brewster (2000). The respondents in the sample had between one and three children (see Figure 7.3); this made up 73% of the sample, while only 51.6% of the sample was married. This finding reflected that respondents in the sample engage in non-traditional family forms. Despite, race, ethnicity or cultural denomination not being a demographic not investigated because of delimitations mentioned in Chapter 5, section 5.6, findings would seem to indicate that perhaps a reason for the predominance of non-traditional family forms is that the majority of the sample in the study are from SADC countries; they therefore belong to traditional African cultures, where 'lobola' or 'bride' is paid and is the basis for family and marriage obligations. Chabata (2012) argues that nearly all traditional marriages in Zimbabwe and other African countries are expected to involve this ritual. According to Mvududu (2002:5), "lobola can be referred to as the institution through which a man pays some property for the right or privilege to marry a woman, and as an indemnity or compensation given by the bridegroom to the bride's family for the 'loss' of their daughter, in terms of the income she would have brought into the family as well as the loss of her labour". The phrase 'commercialisation of lobola' is used to refer to "a system where the payment of 'lobola' has been altered from being a mere cultural practice to a business venture, where a bride has a clear monetary value attached to her" (Chireshe and Chireshe, 2010:5. It also illustrates a state where, "because of the monetary value attached to the bride, payment negotiations are characterised by intense bargaining leading to the payment of a high fee and is almost equivalent to the selling of a commodity on the open market" (Chireshe and Chireshe, 2010:7). The more highly educated the bride, the more she is worth in terms of 'lobola'. This has led to the situation where young adults of African descent engage in non-traditional family arrangements in order to save up for the 'lobola' payment.

In Phase 2, 74.7% of respondents have their families here with them in South Africa (see Figure 7.4). This indicated that the family played an important role in the expatriate academics overall expatriation experience at UKZN and South Africa. These findings support those of Richardson and Mckenna (2003) and Richardson (2005), who found that family plays an important role in the successful adjustment of the expatriate to their new environment in their host country. As the majority of the respondents in the sample have been in South Africa for between 7-10 years (50.6%), this would indicate that 73% of the total sample raised their children while in South Africa.

The majority of the sample in Phase 2 (63.9%) had not worked at any other SA university other than UKZN (see Figure 7.6) for whatever reason which was beyond the scope of the data collected in this study. UKZN was seen as an “employer of choice” according to HR specialists because of its worldwide reputation as “the premier university of African scholarship” (UKZN, 2014) and its rankings on the global university ranking scales such as Quacquarelli Symonds (2014) and Best Global Universities (2014) as one of the top five universities in SA and in the top five hundred in the world. Participants also stated that UKZN was selected as an institution of choice because of its location. UKZN is found on the east coast of SA, with its sub-tropical climate, offered an alternative to universities in Cape Town and Johannesburg, which experience harsh winters. This finding was also consistent with the findings of Doherty et al. (2011) who found that the reputation of the host organisation and location were important to SIEs when selecting their destination of choice.

Just over half of the respondents in the sample in Phase 2 were still on a work permit, with 47% having become permanent residents. This indicates that expatriate academics in the sample still have a “temporary status” in SA, which does not allow them to be fully integrated into SA society due to certain legal restrictions placed on them. According to HR specialists in Phase 3, expatriate academics in the sample were faced with meso-level challenges in the form of immigration policies and practices including that of having a work permit which severely hampers their ability to secure work and be hired to work at UKZN and in SA (Immigration Act). In fact, according to HR specialists the procurement of a work permit is a key requirement before UKZN can officially appoint a candidate to a post (UKZN Recruitment Policy).

Figure 7.7 shows that the majority of the sample in Phase 2 were in permanent positions at UKZN. This would imply that they have access to benefits and compensation packages that are not available to those in ‘temporary’ posts. This finding supported the findings of Stahl et al (2002), Jackson et al. (2005), Thorn (2009) and Froese (2012) where the stability of monthly compensation packages that included benefits such as medical aid, pension, unemployment funds played a role in the SIEs’ selection of their destination of choice.

The majority of the sample in Phase 2 had been in academia for 6-10 years (31.3%) followed by those with 16+ years in academia (28.9%). This finding together with the fact that the majority of the sample of expatriate academics had been in SA for 7-10 years can be interpreted in two ways. Firstly, many expatriate academics had come here as post-graduate students who then were recruited as members of staff. Secondly, as the majority of the

sample are from African countries (Table 7.6), those with 16+ years of experience could have left their home countries because of various 'push' factors such as political and economic instability, social unrest and crumbling infrastructure in the education and healthcare sectors (Kotecha et al, 2012a). In the next section, Theme 2: Skills and staff shortages at SA higher education institutions has been discussed.

9.3 Theme 2: Staff and skills shortages in SA higher education institutions

A comparison of the academic qualifications of SA academics and expatriate academics in SA higher education institutions from Phase 1 was presented over the three years in Tables 6.5-7. (For the categories of academic qualifications, see section 6.2.3.) Over the three years investigated, the majority of expatriate academics held doctoral degrees: 54.5% in 2005, 57.1% in 2010 and 60.3% in 2012, this was done to provide empirical evidence to support the macro-level analysis intended in this study as found in the conceptual framework in Figure 1-1.

The results shown in Table 6.1 imply that in Phase 1 of the study the expatriate academics at SA higher education institutions were highly qualified, highly skilled and were experts in their fields. Tables 6.5-7 also presents the qualifications of SA academics over the same period, with only 28.4% in 2005 holding doctoral degrees, only 32.9% in 2010 and only 35.2% in 2012. A chi-square test of independence was applied to the findings to see if there was a significant relationship between SA and expatriate academics and their qualifications over the three years. The results indicate that in 2005, significantly more expatriate academics held doctoral degrees ($\chi^2 (19, n= 14679) = 290.00, p<0.05$). In 2010, more expatriate academics held doctoral degrees and/or other qualification, while SA academics held more Masters, Honours, Professional first degrees and/or B.Techs ($\chi^2 (22, n= 16556) = 417.27, p<0.05$). In 2012, significantly more expatriate academics held more doctoral degrees, undergraduate diplomas or certificates or Bachelors' degrees (3 years) than SA academics ($\chi^2 (n=16883)= 491.21, p<0.05$). This situation supports the premise that there was a shortage of highly qualified and highly skilled local academics in SA higher education. This finding provides empirical evidence of the ongoing plans by the Department of Education to spend more than R30 million a year to hire academics from developing countries on fixed term contracts to solve the current skills and staff shortages in higher

education in SA (Govender, 2014a). It also supported the findings of previous studies commissioned by SARUA (Kotecha et al, 2012a).

Phase 1 results showed that UKZN presented a similar situation, where 69.58% of expatriate academics held doctoral degrees compared to only 36.9% of their SA colleagues (See Table 6.15). Results for the Masters, Honours, professional bachelors' degree and bachelor's degree were similar amongst expatriate academics and SA academics at UKZN. This was different to the patterns seen at national level. These findings supported the results of Kotecha et al (2012a) study, where it was also found that the expatriate academics in SA higher education were more highly qualified and skilled than their SA counterparts.

However, the SA situation remained better than that in most African countries, where only 25% of all academics held a doctoral degree (Cloete et al, 2011). Due to the skills shortage in SA higher education, there has been a need to bring in the necessary skills and expertise in order to deliver the appropriate teaching and learning programmes at higher education institutions in order to grow and develop the new generation of SA workers. This priority was part of JIPSA (The Presidency, 2006), where the highly skilled expatriate serves two purposes. According to Rasool (2012:404), they firstly enhanced the economy by bringing in much needed skills and expertise and, secondly, they were able to transfer their skills and knowledge to the local workforce, which in this context are the students and staff at institutions of higher education.

The results of Phase 1 of the study indicated that the number of SA citizens in higher education had dropped significantly from 2005 to 2012, provided empirical evidence to support the views of the ETDP and Cloete et al. (2011). The figures have dropped from 92.6% in 2005 to 87.8% in 2012 (see Table 6.3). This trend indicated a staff turnover of SA academics of more than 1134 over the eight year period. This finding was supported by Kotecha (2012a) whose survey found that SA higher education is currently facing staff shortages in the science, engineering and technology fields, followed by the health sciences, business management and law and agriculture fields. During the same period, there was a steady increase in the numbers of expatriate academics being recruited in SA higher education (see Table 6.3). Thus, it becomes evident that expatriate academics were being recruited to solve the current staff shortages in SA higher education, especially in the scarce skills disciplines.

In Phase 1 of the study, at UKZN the majority of expatriate academics (62.2%) belonged to the College of Engineering, Agriculture and Science which comprised of disciplines on the Scarce Skills List (Kotecha et al, 2014). This was followed by the College of Humanities (21.6%), Law and Management Studies (11.5%) and finally the Health Sciences (4.7%) (see Table 6.9). This trend was slightly different to the findings of Kotecha et al. (2012a) where Science, Engineering and Technology had the highest number of staff shortages, followed by Business and Law and Management, then Humanities. The respondents in the sample in Phase 2 of the study, reflected the current status quo at UKZN, in that the majority come from Science, Agriculture and Engineering (71.1%), followed by Law and Management studies (16.9%), Humanities (9.6%) and Health Sciences (2.4%) (see Figure 7.8). These results indicated that expatriate academics at UKZN were being recruited to address the current skills shortage crisis at UKZN in the scarce skills disciplines. These results are supported by previous studies by Kotecha et al (2012a) and SARUA (2011).

In Phase 1 of the study, Table 6.14 represented the level of academic posts held by expatriate academics at UKZN. The majority of the academics held lecturer posts (35.1%), secondly, the post of senior lecturer (28.4%), thirdly, those at associate professor level (22.9%) and those in leadership positions making up 12.1% of the total number of expatriate academics at UKZN. This result indicated that, even though expatriate academics are more highly qualified than their SA counterparts, they are in the minority when it comes to senior leadership and management positions. This could be interpreted as indirect discrimination on the part of UKZN as well as a reflection of the attitudes of xenophobia and professional jealousy encountered by expatriate academics from UKZN in the national media (Soobramoney, 2014; Ngcobo, 2014; Laer and Janssens, 2011). It could also be seen as a limitation placed on this group of SIEs in terms of national and ethnic demographics when it comes to promotion opportunities, which is similar to those found in Qatar by Rodriguez and Scurry (2014).

Table 7.20 represented the breakdown of the level of academic posts, in Phase 2 held by academic expatriate respondents at UKZN. Firstly, 35.1% of expatriate academics were shown to hold the post of lecturer; secondly, 28.4% of expatriate academics hold the post of senior lecturer; thirdly, 22.9% of expatriate academics hold the post of associate professor; and finally, 7.4% of expatriate academics hold the post of full Professor. Academic promotions to senior ranks, such as those of Associate Professor and Full Professor are *ad hominem* promotions and are accessible to all academics. Each institution has clear criteria

for promotion up the ranks and all academics were encouraged to meet them mostly through publication, teaching and academic citizenship. These findings supported previous studies by Locke (2007) and Altbach (2004), who found that academic migration took place at all levels of academia. The majority of expatriate academics held the post of lecturer which only requires a minimum of a Master's degree qualification. This highlighted a common problem among the highly skilled, who took on posts in their host countries below their level of qualification, skills and expertise in search of better career prospects. This phenomenon defined as 'underemployment' is a common problem faced globally by the highly skilled (Al Ariss, 2012). These results supported previous studies done by Al Ariss (2010, 2012).

In Phase 3, academic line managers in the scarce skills disciplines supported the evidence from Phases 1 and 2 of this study, as they indicated their academic programmes would not be able to operate if it were not for the expatriate academics in their disciplines with their scarce skills and high qualifications. In fact, many participants alluded to the fact that their disciplines would not be able to offer postgraduate programmes if it were not for the presence of expatriate academics. In other words, expatriate academics at UKZN are viewed as experts who transfer their knowledge, skills and expertise to the students as well as other staff members in their disciplines, but from the evidence provided in Phases 1 and 2 it would seem that they are not given the opportunities to develop themselves in terms of career progression (promotion to leadership and management posts). This is similar to the situation SIEs find themselves in Qatar (Rodriguez and Scurry, 2014). Next, the theme discussing the academic mobility patterns of expatriate academics coming into SA is presented.

9.4 Theme 3: Academic mobility patterns amongst expatriate academics in SA

In Phase 1, the countries/regions of origin of the expatriate academics in SA higher education for 2005/2010/2012 were examined in order to determine the source of SA's highly skilled foreign talent, this served as empirical evidence for the concepts found in the conceptual framework in Figure 1-1, in terms of macro-level analysis of expatriation into SAHEI. The results from Phase 1 are presented in Figure 6.3 and showed that Zimbabwe has been the largest single country to contribute to academics to South Africa over the three years. SADC countries, including Zimbabwe, contributed 34% of the total number of expatriate academics in South Africa in 2005, 35.5% in 2010 and 41.4% in 2012. A chi-square test showed that

there was a significant relationship between the year (2005/2010/2012) and the country of origin ($\chi^2(36, n=3632) = 109.69, p<0.0005$). Specifically in 2005, more than expected academics came from Europe, Mozambique and Zambia. In 2010, more than expected came from Asia and in 2012, more than expected came from the Democratic Republic of Congo, Lesotho and Zimbabwe. The other major suppliers of expatriate academics to SA from SADC countries are Zambia and Malawi. This was consistent with the findings of Altbach (1996), Maharaj (2011) and Kotecha et al (2012a), who also found that SA universities were primarily recruiting from African, especially SADC, countries. The results of the study also showed that Europe was a major contributor of academics to SA higher education over the three years, with 23.5% of the total number of expatriate academics in SA for 2005, 27.1% in 2010 and 34.1% in 2012. These findings support previous studies by Maharaj (2011).

Phase 1 results indicated that Asian countries have contributed between 4-6% of the total number of expatriate academics over the three year period. The results were consistent with the literature that showed that individuals relocate to destinations where there is less cultural distance between the home country and the host country so that there is minimal “culture shock” (Hofstede and Hofstede, 2005). Relocating to SA that has been called the ‘rainbow nation’ implies that there is a melting pot of diversity and culture present in SA society. African, European and Asian cultures are present in SA society today as these groups make up the diversity that makes up SA today. Unfortunately, in as much this could be why many expatriate academics come to SA, current feelings of xenophobia taint this perception. This is because of the high employment rates amongst local citizens who feel that foreigners are here to take their jobs (MacFarlane, 2012; Ngcobo, 2014).

In Phase 1, the findings from UKZN concerning the comparison of country of origin of expatriate academics in the three years was presented in Table 6.13. Non-SADC countries were a major contributor of expatriate academics to UKZN in 2005 and 2010, followed by Europe and then Zimbabwe. In 2012, UKZN sourced the majority of its expatriate academics from Zimbabwe (27.8%), followed by other African countries (26.8%) and Europe (21.1%). These findings are in contrast to those of Kotecha (2012a), who indicated international countries (non-African) as the major contributors of expatriate academics to SA higher education, in 2010. This was also in contrast to the national norms established for 2012, as the second and third largest contributors of expatriate academics in 2012, where the positions were reversed. The national survey undertaken in Phase 1 of this study revealed similar results to that of the institutional survey of UKZN, where in all three years SADC countries

account for the highest percentage of expatriate academics employed at UKZN. These results were supported by previous studies done by Altbach (1996, 2004) and Maharaj (2011).

In Phase 2 of the study, the sample respondents were mainly from Zimbabwe (27.7%), secondly those from India (12%), and thirdly from Nigeria (10.8%) (See Table 7.16). In terms of regional distribution, Africa was by far the largest supplier of expatriate academics to UKZN with 71.7% of the total sample, followed by Asia with 12.4% then Europe with 8.4% and finally the Americas (North and South) with 3.6%. Thus, the sample demographics in terms of country of origin was slightly different to that of the institutional survey undertaken in Phase 1.

These findings were consistent with the findings by Jansen, (2013), who found that many African countries, like those in the SADC region are losing their highly skilled academics to South Africa because of the deterioration of working conditions and political and socio-economic instability. MORE 2 (2013) also found that many European academics were choosing to relocate to other regions around the world for the same reasons. Vaughn (2007), Altbach and Knight (2007) and Altbach et al. (2012:12) found that “Indian and Pakistani academics also were motivated by similar reasons and were attracted by the better working conditions and higher salaries in regions such as the Arabian Gulf, South-East Asia, the Americas and South Africa”. These types of reasons are called ‘push and pull factors’. Above, the possible ‘push factors’ that attracted expatriate academics to SA have been probed. In the next section, the possible ‘pull factors’ that attracted academics to SA are discussed.

In Phase 1 of the study, the recipient universities of expatriate academics in SA were ranked according to the number of expatriate academics employed over the three years (see Table 6.2) and indicated that WITS was the number one ranked institution in SA in terms of the number of expatriate academics employed over the three years. UCT was ranked second over the three years. Previous studies have indicated that international academic migration is focused on ‘magnet’ institutions (Knight, 2006; Regenesys Business School, 2013). These two institutions have been recognised as the most popular research institutions in the country, where just under two thirds of the staff have PhDs (IEASA, 2011). In fact Govender (2014b) claims that at least 29% of teaching staff (academics) at WITS and one out of every four academics at UCT are expatriates.

WITS based in Johannesburg was the country's second highest ranked institution and improved by a huge 50 positions to 313 on the Quacquarelli Symonds (QS) World University rankings for 2013 (Davies, 2013). The world-wide ranking scale known as the Quacquarelli Symonds (QS) ranking for 2013/2014 ranked UCT at 145, making it the highest ranked African and SA university on the world rankings (MacFarlane, 2013; Quacquarelli Symonds Limited, 2014). In the three years examined, UP, UKZN and UNISA remained in the top ten ranked higher education institutions employing expatriate academics. Of these universities, UKZN and UP together with Stellenbosch University also appear in this list. They also appear on the Top 100 Emerging Economies university rankings list developed by the Times Higher Education group in an effort to rank the universities in Brazil, Russia, India, China and South Africa (BRICS). Best Global Universities (2014) ranked UCT at 151 for 2014, once again making it the highest ranked SA university, followed by WITS at 270, Stellenbosch at (371) and UKZN at 417.

UCT was placed third, followed by WITS, which was placed fifteenth; next was US in twenty-first position, then UKZN in forty-fifth position and finally UP in seventy-eighth position. The World QS rankings listed UP at 471-480 and UKZN at 501-550 (MacFarlane, 2013; *Quacquarelli Symonds Limited*, 2014). According to Gerda Kruger, executive director of Communication and Marketing at UCT, "a good performance in international rankings does assist in sending out the message that world-class education is available in South Africa. Both prospective students and academics around the world use the rankings to decide where they want to study and advance their academic careers" (cited in MacFarlane, 2013). WITS vice chancellor, Adam Habib argues that "even if we had the right number of academics [SA], it is important to have an international professoriate because it brings a cosmopolitan feel to the institution" (Govender, 2014b). These results reflected the desire of the top five universities in South Africa's policies to internationalise their programme offerings in order to attract more students and academics, both internationally and locally. For example, UCT has in its mission statement, "UCT aspires to become a premier academic meeting point between South Africa, the rest of Africa and the world. UCT will promote diversity and transformation within our institution and beyond, including growing the next generation of academics" (UCT, 2014). Another example of an institution striving to become a destination of choice for international academics is the mission of UKZN to become the "Premier University of African scholarship" and a "center for academic excellence"(UKZN, 2014).

9.5 Theme 4: The motivation to relocate amongst expatriate academics at UKZN

This study has sought to use a quantitative methodology in Phase 2, to investigate the reasons why expatriate academics would want to come to South Africa; this aims to address the gap in the literature, which has previously examined the motives for international mobility using predominantly a qualitative methodology. The study attempted to quantify the motives of expatriate academics, so that these could be ranked in order of importance. There have been several authors that have requested more information on the motives of self-initiated expatriates (Banai and Harry, 2005; Bonache, Brewster and Suutari, 2007) emphasising “the importance of this dearth of data and analysis (at a time when) individual’s travelling abroad to find their own work is a widespread phenomenon” (Brewster and Suutari, 2005:12). Richardson and associates have been among the few researchers who have answered this call for further research (see Richardson and McKenna, 2002, 2006; Richardson, 2003, 2009; Richardson and Mallon, 2005), as well as Froese (2012) and Thorn (2009).

This study addresses the gap in earlier studies of identifying the motives of self-initiated expatriates in a quantifiable manner in order to better serve their needs so that the organisation can retain this valuable global talent. The study examined the motives of career, adventure and travel, financial considerations, life change, concern for children, and family considerations as the reasons why academics would want to expatriate to South Africa.

An examination of the mean scores ranking the motives listed above ranged from having a highly significant influence (5) to having no influence (1) is found in Table 7.21. These findings indicated that career matters have a moderate influence on the respondents’ motivation to expatriate (mean= 3.43, sd.=1.05). Further analysis of the items that made up the Career Matters component of the Motivation to Expatriate sub-scale (see Figure 7.7) revealed the following: Pursuit of Meaningful Work (mean=4.01, sd.= 1.12) (42.2% highly significant, 36.1% significant influence); Career Advancement (mean=3.79, sd.=1.38) (42.7% highly significant, 24.1% significant influence); Acquisition of New Knowledge (mean=3.70, sd.=1.40) (41% highly significant, 21.7% moderate influence). Around 40% of respondents indicated that these three items were highly significant in their decision to relocate to SA. Between 24-36% of all respondents indicated that these items had a significant influence in their decision to relocate to SA, while close to 20% of respondents

indicated that the acquisition of new knowledge had a moderate influence on their decision to expatriate. The item the pursuit of meaningful work (mean=4.01, sd.=1.12) could be seen as academics from African countries especially those from the scarce skills fields trying to access the infrastructure available in SA universities and UKZN in particular in order to pursue their research interests (Kotecha et al, 2012a).

These results contradict the findings of studies by Stahl et al. (2009), Richardson (2002) and Froese (2012) where it was found that personal challenge and seeking adventure/travel were the major reasons for expatriation. The results of the current study supported the findings of Fee and Karsaklian (2013) and Thorn (2009), who found that for respondents in their studies, career was the most important motive as they had gone to Africa for new career challenges and opportunities. This finding was consistent with the findings of the countries of origin in Phase 1 of the study at UKZN, where the majority of academics come from African countries, therefore they would be part of the 'brain drain' from their home countries who have left in order to escape the poor working conditions there and are seeking better career opportunities in SA.

The second highest mean score for the Motivation to Expatriate sub-scale was for the Seeking Adventure/Travel component as a reason to relocate to SA (See Table 7.21). These findings indicated that Seeking Adventure/Travel has a moderate influence on the respondents' motivation to expatriate (mean=2.98, sd.1.39). The items that make up Seeking Adventure/Travel as a reason for expatriation were: Opportunity to See New Places, Meet New People and Experience Different Cultures (mean=3.15, sd.= 1.39) (moderate influence 29.3% + 20.7% highly significant influence) and Challenge to Self (mean=2.86, sd.=1.44) (moderate influence 30.1% + 18.1% highly significant influence). These findings show that Seeking Adventure/Travel was of little to moderate influence on the respondents in the sample at UKZN's decision to relocate, thus this contradictory to the findings of Osland (1995); Richardson (2003); Thorn (2009) ; Froese, (2012); Fee and Karsaklian (2013) in which expatriation is seen as a 'hero's adventure' (Osland, 1995:13). Responses showed that less than 50% of the total sample felt that these items were influential, with around 30% indicating that the opportunity to see new places, meet new people and experience different cultures and deciding to relocate as a way to challenge oneself was moderately influential. Only around 20% of the total sample responded that these two statements had a highly influential influence on their decision to relocate.

The third highest mean score on the Motivation to Expatriate sub-scale was for the component Financial Reasons (mean=2.79, sd.= 1.29) (see Table 7.21). These findings indicated that Financial Reasons had a moderate influence on the respondents' decision to expatriate. The items dealt with financial reasons like (see Figure 7.9): Better Benefits (mean=2.82, sd.= 1.31) (26.5% significant influence, 22.9% no influence); Better Salary (mean= 2.79, sd.1.31) (24.4% moderate influence, 22% no influence). These findings support the findings of previous studies by Jackson et al. (2005), Thorn (2009), Froese (2012), Fee and Karsaklian (2013) and Selmer and Luring (2013a) and contradict Richardson's (2002) study, which indicated that financial concerns were of little influence in the decision to expatriate. So, even though studies by Altbach et al. (2012) revealed that SA academics are amongst the best paid in the world, these findings demonstrate that this was not a significant reason to relocate for expatriate academics in the sample at UKZN.

Lifestyle Changes scored the fourth highest mean score on the Motivation to Expatriate sub-scale (mean=2.27, sd.=1.07) (see Table 7.21). These results indicated that overall, these items had little influence on the decision to relocate amongst the respondents in the sample. Figure 7.10 in Chapter 7 presents the items used to distinguish Lifestyle Changes as a reason to relocate: Reinventing Oneself (mean=2.64, sd.=1.55) (38.6% no influence, 18.1% significant influence); Searching for One's Life Purpose (mean=2.63, sd.=1.58) (38.6% no influence, 18.1% significant influence); Boredom with Old Routine (mean=2.17, sd.= 1.45) (51.2% no influence, 11% highly significant influence); Dealing with Personal Problems (mean=1.65, sd.=1.18) (72.3% no influence, 4.8% highly significant influence). Figure 7.10 indicates that 51.2% of all respondents attached no influence to the statement that dealt with their being bored with their routine at home as a reason for expatriating. The majority of the respondents (72.3%) indicated that there were no personal problems, that is, problematic relationships at home or at work, from which they were trying to escape. Trying to change one's destiny and 'reinventing oneself' had no influence on 38.6% of respondents' decision to expatriate. 'Searching for One's Life Purpose', in other words, the view that academia is a 'calling', had no influence on the majority (38.6%) of participants. This finding challenges the research of Richardson and her colleagues (2002; 2006) and of Froese (2012) where lifestyle changes are seen as an important reason to expatriation. It also challenged the research done by Halsey (1992) cited in Froese (2012), where academics seek overseas positions to escape job insecurity at their home institutions as well as to "escape extremely competitive labour markets" (Froese, 2012:1102). It also serves to challenge the view that disillusionment with personal circumstances and poor work conditions is one of the leading

causes for increasing international mobility amongst academics (Richardson, 2002, Selmer and Lauring, 2013).

The components Concern for Safety and Security of Children (mean=2.09, sd.=2.09) and Family Matters (mean=1.41, sd.=0.09) on the Motivation to Expatriate sub-scale were the lowest ranked reasons for relocation in this study. These scores imply that these items had little or no influence on the respondents' reason to relocate in Phase 2 of the study. The items on the Concern for the Safety and Security of Children component of the Motivation to Expatriate sub-scale were: Quality of Life (mean=2.81, sd. 1.2) (34.9% moderate influence, 19.3% little influence, 19.3% significant influence); Better Education for Children (mean=2.0, sd. 1.34) (55.4% no influence, 15.7% little influence); Concerns for the Safety and Security of Children (mean=1.49, sd.=0.98) (74.4% no influence, 34.9% moderate influence). These results could be attributed to the fact that the majority of respondents are single and those with children have raised their children here in SA, as the majority of respondents with children have children below 10 years old and the majority of the respondents at UKZN have been in SA for between 7-10 years. The results of this study challenge previous studies done by Anderson (2001), Richardson (2002) and Froese (2012) in which they reported that family played an important role in the decision to expatriate. According to Richardson (2002), participants interpret their decision to expatriate in relation to their family, particularly their partners as their significant others. This finding could, however, be attributed to the 'continuum of importance' described by Richardson (2002), suggesting that it is not that the extended family is no longer important but rather that more priority is given to immediate family rather than others. This finding could also be a reflection of the changes in values and priorities recently being explored by the attitudes of self-determination that this group of SIEs displays.

Thorn (2009:5) argues that previous research has been characterised by "haphazard and simplistic views of motivation" primarily focused on the financial benefits. Ackers (2005) suggested a more holistic way of looking at motivation by acknowledging that there are a variety of factors that influence an individual's motivation to move from one country to another. Moreover, he suggested that the "menu and significance of factors might change over time as careers develop and lives evolve" (Ackers, 2005:106). This could be an explanation of why there are no strongly positive responses to the components of the Motivation to Expatriate sub-scale. The findings reveal that career matters are ranked first as a reason to relocate amongst academics in the sample in Phase 2, followed by seeking

adventure and travel opportunities and financial reasons that can be grouped second because of their similar mean scores. Lifestyle changes and concerns for safety and security of children would be ranked third as reasons to relocate also based on their mean scores.

The discussion of these reasons for relocation of the respondents in the current study can usefully be framed using the four metaphors created by Richardson (2002). The first metaphor was the expatriate academic as '*explorer*'. The results in the current study indicate that the majority of respondents fit this description only to a moderate degree. Responses to items for the components on the Motivation to Expatriate sub-scale ranged from little influence to significant influence (20-30%). The second of Richardson's metaphors was the expatriate academic as '*refugee*'. Results from this study show that the majority of respondents did not see themselves as refugees. The idea of escaping from personal or professional problems and reinventing oneself in their home country was definitely not the reason why they had come to South Africa. Responses to the items concerning lifestyle changes ranged from 72.3% to 38.6% and indicated that these items had no influence on the decision to expatriate amongst respondents. Richardson's third metaphor was the expatriate academic as '*mercenary*'. However, respondents in the current study did not explicitly seek financial benefits as their reason to expatriate. These findings support previous research by Richardson (2002), where money (salary) was not a primary motivator to expatriate. In addition, economics was ranked third in Thorn's (2009) study and this is the case here too. It was interesting to note that respondents in this study rank better benefits above salary; this could imply that respondents are more interested in the long term benefits than their current financial situation. The job security and stability that comes from permanent employment seems to be of greater consequence than high salaries. The fourth metaphor created by Richardson was the expatriate academic as '*architect*'. Career building issues is a dominant reason for expatriation by expatriate academics in the study. The sub-motive pursuit of meaningful work scored the highest mean score from all sub-motives, that is, 4.01, with 42.7% of respondents indicating that this was a highly significant influence. The item, Career Advancement also scored a mean score of 3.79, with 42.2% of respondents indicating that this was a highly significant influence.

Further analysis of these findings using the framework from Selmer and Luring (2013), found that the respondents in the study exhibit cognitive reasons for wanting to relocate. This was because career building is the dominant reason for relocation and Selmer and Luring (2013) suggests that those who support the pursuit of a meaningful career as a primary reason

to relocate could be classified as having cognitive reasons for wanting to expatriate. The authors suggest that these individuals would have an easier time adjusting to their new environments than their colleagues who may have expatriated for personal reasons. As these respondents in Phase 2 are SIEs, this is consistent with the premise of the protean career agent who uses their own “personal compass” to determine their career paths (Hall, 2004:2). This finding is useful to HR practitioners, who can now offer the necessary organisational support to expatriate academics so that they can become productive and adjust faster to their new working environments. These findings are supported by participants in Phase 3 of the study, that is the academic line managers who also reported that they felt the university could do much more in terms of the kind of support they offered expatriate academics in order to facilitate a smoother adjustment to their new environments.

Further statistical analysis of the findings of the study found that there were no statistically significant differences in the respondents’ reasons to relocate and the following demographic variables: Age, Gender, Marital Status, Number of Dependents, Period of Expatriation Experience, Field of Study, Expatriation Experience or Career Orientation. These findings are in contrast to the findings of Thorn (2009) and Froese (2012) in which age, gender and marital status, number of dependents and duration of expatriation experience were found to be determining factors in the perception of motivating factors that led to expatriation. The results also challenge the findings of Froese (2012), who found that those academics in Humanities saw their highly competitive working conditions as a reason for them to want to expatriate. Further investigation in this study into the relationships between the Motivation to Expatriate and Experience of Expatriation as well as the Career Attitudes of expatriate academics in the sample revealed no significant results.

9.6 Theme 5: The career orientation of expatriate academics at UKZN

SIEs seem to mirror descriptions in the literature of individuals with a protean career attitude in that they are both “self-initiated (taking an independent and proactive role in managing their own careers) and values driven (following their own career values and vocational development)” (Briscoe et al., 2006: 30).

Individuals are said to have a boundaryless career if there is “independence from rather than dependence on traditional organizational career arrangements” (Arthur et al, 1996:6). A

boundaryless career can involve physical and/or psychological mobility. In Figure 4.2, Sullivan et al. (2006:21) portray a model depicting a boundaryless career on a continuum, using different quadrants, combinations of high/low physical and psychological mobility to reflect different career profiles. The current study used the “Protean and Boundaryless” Career Attitude scale (Briscoe et al. 2006) in Phase 2, to identify whether the respondents exhibit a protean career orientation and/or boundaryless career attitude which studies have claimed go hand in hand with the characteristics of SIEs. They “developed 16 possible combinations that could serve as useful guidelines in defining “Protean and Boundaryless” career orientation in the SA context” (Briscoe and Hall, 2006:17). Once the combinations amongst respondents in Phase 2 of the study had been determined, then the possible challenges that these individuals may face can be examined, as can those that face the organisation with an active interest in their career development.

The results of the PBCA (Briscoe et al, 2006) scale indicate that respondents in Phase 2 of the study exhibit a high value for the Self-directed Career Management attitude, with a mean score of 4.17. According to Segers et al. (2008:214), “a person with a strong self-directed career management attitude will be motivated by achievement and opportunities for personal growth through formal training or from mentors or coaching in the organisation itself, thus allowing them to move quickly through the career cycle”.

Respondents in Phase 2 of the study exhibit a high value for the Values Driven career attitude as well, with a mean of 3.66. Hall (2004) argues that people with a high values-driven career attitude measure their success based on psychological/subjective success and will be “more motivated to uphold their personal ideals or principles rather than extrinsic motivators such as money, status or promotion” (Segers, et al. 2008:215). This is proved by the responses of academics in Phase 2, who did not attach much importance to financial reasons as a reason to relocate to SA.

According to Hall (2004), those who exhibit a protean career attitude (those who score high on the Self-directed Career Management and Values Driven scales) are able to develop a greater adaptability and self-awareness, hence ensuring a ‘proactive smart’ employee. This adaptability allows the individual to be self-correcting and proactive with regard to new demands from the organisation. A protean career attitude would encompass the” basic, career related attitude that motivates the SIEs’ career development process and international career experience in general” (Crowley-Henry, 2007:47; Cao et al, 2012). This finding was supported by the findings of the Motivation to Expatriate sub-scale, where respondents

indicated that their career progression and development was their primary reason to relocate to SA. This finding is also supported by academic line managers in Phase 3 of the study, who valued the presence of expatriate academics in the disciplines because of their strong work ethic. Line managers found that these academics were always willing to take on additional responsibilities and work later than their local colleagues.

Respondents in Phase 2 of the study exhibited a high score for the boundaryless mindset (BM) attitude, with a mean score of 3.80. Participants scored a mean score of 2.55 for the organisational mobility preference (OM) career attitude. Sullivan and Arthur (2006:21) have developed a model to describe the two dimensions of boundaryless careers (see Figure 4.2). Quadrant 3 in Figure 4.2 “best describes the dimension of boundaryless career attitudes exhibited by the respondents in the study, that is, careers exhibiting strong psychological but low physical mobility” (Sullivan and Arthur, 2006:21). This was an apt description of the respondents in the study, as expatriate academics do “recognize and act on opportunities for psychological career mobility with a pertinent focus on employability” (Sullivan and Arthur, 2006:21).

Sullivan and Arthur (2006) describe individuals who belong to this group as “highly skilled professionals”, which is just what the expatriate academics in the current study are, with 75.9% of the sample having their doctorates. Buchner (2007:209) states that expatriate academics will definitely fit this profile as they choose to remain in academia, where the rules of engagement tend to remain intact, while seeking opportunities at other universities such as visiting professors, sabbaticals, exchange programmes and collaborations. This attitude can prove to be problematic also, as academic line managers pointed out those academics that were not on the permanent staff (temporary posts) were often less motivated and committed to their posts than their expatriate counterparts who were on the permanent staff, these were often those who had not successfully adjusted to their new environments. On the other hand, those academics on temporary contracts who had successfully adjusted to their new environments and/or wanted to remain in SA often had the attitude of wanting to make the best of things under the circumstances.

In Phase 2 of the study the “Career Profiles of Contemporary Career Agents”, developed by Briscoe and Hall (2006:16) (see Table 4.2) was applied in order to identify the type of career agents the academics in the sample were. This was done with the intention of identifying the best possible way of managing these academics in order to enhance their career experience at UKZN. In terms of these career profiles, the individuals in the study can be best described as

'solid citizens'. They are protean in the sense of their being both highly self-directed and values-driven. They are psychologically boundaryless but choose not to be physically boundaryless due to personal preference or circumstance. These people choose to remain in a stable environment but will act if their autonomy, curiosity or values are challenged (de Bruin and Buchner, 2009). Organisations like the university that are home to such individuals, and as such need to recognise their mobility limitations but also harness their immense potential contribution to the organisation, such as the networks and collaborations with international colleagues and/or colleagues in their home countries, with whom they maintain close ties with as seen by the results in the Expatriation Experience sub-scale in Phase 2.

Briscoe and Hall (2006) suggest that organisations should ensure the development of a range of contributors (such as personal development programmes, organisational support in the form of mentoring and coaching) that would make such individuals remain with the organisation. This is consistent with the findings from Phase 3 of the study, where both line managers and HR specialists agreed that more organisational support in the form of personal development programmes, mentorship, coaching and opportunities for personal growth should be provided to assist expatriate academics at UKZN to successfully adjust to their new environments. The results of the current study show that demographic variables (such as age, gender, marital status, number of children and location of expatriate's family as well as the field of study to which participants belong) presented no significant differences in the expatriate academic's career attitude. This challenges the findings of Segers et al (2008) and Okurame and Fabunmi (2013), who found significant differences between the demographic variables of age and gender on the career attitudes of their samples.

However, in Phase 2, statistically significant differences ($f=3.36$, $p>0.05$) were found between the categories of the number of years of experience as an academic and the boundaryless mindset (BM) of respondents. Those that have been academics for 11-15 years (mean=4.25) revealed that they saw themselves as having a boundaryless mindset to a considerable extent, while those with fewer years of experience did not. Therefore the deduction can be made that people who have been academics for a long time have relatively well established social and professional networks and therefore enjoy working on tasks and projects outside the university without actually leaving the employ of the university, like *'visiting professors'* who liberate their minds without leaving their stable environment. Furthermore, it can be determined that as academics in the sample in Phase 2, have close ties with friends, family and colleagues back home, they would enjoy the opportunities that

UKZN offers in terms of opportunities to attend international conferences, engage in collaborative research and engage in staff exchange programmes.

The findings of the study also illustrate that there is a significant difference in the perception of the Boundaryless Mindset (BM) and the Organisational Mobility (OM) Preference and the period of the career experience in South Africa. Those academics that have been in the country for between seven and ten years ($f=4.58$, $p>0.05$) had the highest mean score (mean=4.01) for Organisational Mobility Preference. These findings therefore support those of Enach et al. (2008:1945). The number of years academics spend in an organisation impacts on their boundaryless career attitude as, according to Enache et al. (2008;7), their “notion of subjective career success is mediated by the extensiveness of their internal and external networks or the extent to which they develop and enhance their social capital within and beyond the organisation’s boundaries”. According to academic line managers in Phase 3, the extensive networks of expatriate academics in their disciplines have greatly enhanced the teaching and research opportunities available to staff and students in their disciplines. Furthermore, extensive networks and international contacts of expatriate academics have significantly impacted on UKZNs ability to attract world renowned academics to be keynote speakers and session chairs at local and international conferences organised by the university.

The results of Phase 2 of the study also showed that all expatriate academics across the periods of career experience have a negative perception of organisational mobility ($f=4.15$, $p>0.05$). This implied that expatriate academics were generally satisfied and experienced psychological career success at the university. Mean scores range from (mean=2.99) (7-10 years) to (mean =2.07) (10+ years). Enache et al.’s (2008;8) study found that “organisational mobility preference was negatively associated with individuals’ perceptions of success in their careers and their assessment of their career development; hence the findings of the current study agree with their results”. These findings were supported by the results from Phase 2 of the study concerning school support where 62% of academics in the sample (see figure 7.16) were positive about their experience at their schools (disciplines).

Findings indicate that there are no significant relationships between the participants’ Motivation to Expatriate and their Career Attitudes. There is a weak positive relationship between the Fulfillment of Workplace Expectations and Organisational Mobility (OM) Preference ($r=.23$, $p>0.05$), as well as between Support from Other Expatriates and Organisational Mobility (OM) Preference ($r=.28$, $p>0.05$). Both Fulfillment of Workplace Expectations and Support from Other Expatriates components of the Expatriation Experience

sub-scale had low values. This seems to indicate that, even though expatriate academics' expectations regarding their living conditions and general work environment were not met, they still prefer to remain at the university as it would seem that they are satisfied and committed to their schools (disciplines). This was an anomaly that needs to be investigated further by future researchers.

9.7 Theme 6: Career experiences of expatriate academics at UKZN

One aspect of the questionnaire "The Career Experiences of Expatriate Academics at UKZN" covered the Expatriation Experience sub-scale. This sub-scale focused on two very important aspects of expatriation, namely the perception of organisational and social support. These two aspects have been identified as two critical aspects of any successful adjustment to an international career experience (Milligan et al, 2013; Albrecht, 2001). The components Pre-departure Phase Experience, School Support and Fulfilment of Workplace Expectations made up organisational support. The components Family and Friends Support and Support from Other Expatriates made up social support. These results are from Phase 2 of the study, as such responses are from the expatriate academics themselves.

9.7.1 Sub-theme 1: Organisational support

For the component School Support, the mean score was 4.80, implying that respondents agreed slightly that the support shown by their school was positive; here statements dealt with the perception of support from the expatriate academics' colleagues and immediate supervisor. For items dealing with perceived support from the school in terms of research (mean=4.73) and teaching (mean=4.37), 47% of the respondents agreed slightly and 47% agreed. This provides what Black (1998:278) calls evidence of workplace adjustment, namely, that expatriate academics perceived a high level of support from their school (work) when it came to adjustment to their work environment.

In response to the item 'perception of school support', academics who have been in South Africa for 1-3 years have the highest mean score (mean=5.44); next are those who have been here for 4-6 years (mean=4.88), followed by those here for 7-10 years (mean=4.64) and, finally, those here for over ten years (mean=4.20). The responses range from agreeing slightly to remaining neutral. These findings indicate that the majority of respondents (62%)

are positive in their perception of school support during their career experience and they support Tharenou and Caufield's (2010) findings that organisational support during expatriation is critical for the success of the international career experience.

With regard to the Pre-departure phase, the two related items were whether academics had received 'realistic living previews of South Africa' (mean=4.58, sd.=1.76) and what their perceptions were of the 'level of support received from the university during this time' (mean=3.93, sd.=2.129). The majority of respondents indicated that they had a fairly good idea of what to expect regarding living conditions in South Africa, with 28.9% agreeing and 25.3% agreeing slightly. This could be because of personal interest or organisational input.

For the level of support received from the university during this phase, the majority of respondents, in Phase 2 strongly disagreed (20.5%) that there was a high level of support from the university, while 19.3% chose to express no opinion. UKZN has a relocation policy in place to cover the costs of relocation and, according to HR specialists in Phase 3, this policy is one of the best in SA. However, in response to the item whether 'on taking up the new position the university offered support to my family, for example, accommodation, employment, schools, etc.', a mean score of 3.83 (26.5% having no opinion and only 16.5% agreeing slightly) shows that the expatriate academics are not totally satisfied with the level of support that they have received from UKZN during this time.

There were significant differences in academics responses in Phase 2, regarding the 'Pre-departure phase experience' between those academics that have been in South Africa for different periods of time. Furthermore, those expatriates who have been in the country 1-3 years have the highest mean score (mean=5.19), followed by those who have been in South Africa for 4-6 years (mean=4.48); then comes those who have been here for 7-10 years (mean=4.23) and finally those that have been here longer than 10 years (mean=3.07). The responses range from agreeing slightly to disagreeing slightly that this dimension played a significant role in academics expatriation experience. The participants in the study that have been here for the shortest period would have the freshest memories of their pre-departure experience, in terms of organisational and social support. Responses to the items here did not elicit particularly strong positive or negative responses. This is indicative of the career attitude the respondents portray, that is a protean career attitude, where they will endure hardships and persevere. The findings of the study indicate that overall, respondents felt positively about their pre-departure experience (72%), thus supporting studies by Ashmalla

(1998:57) and Shen (2005:658) that suggest that during the pre-departure phase of an international career experience, expatriates should have proper support.

An examination of expatriate academic respondents' perceptions of their relationships with host country nationals, in Phase 2 revealed that for the item, 'I receive excellent collegial support in this school' scored a mean score of 5.02 (31.3% agreeing and 19.3% agreeing strongly). These results show that generally expatriate academic respondents seem to have a cordial relationship with their host country colleagues. The statement 'my school is a collegial place to work' scored a mean of 4.8 (38.6% agreeing and 19.3% agreeing strongly). Hence, in terms of Black and Gregersen's (1992) model, these academics seem to illustrate a 'dual citizen' profile. This is the most suitable type of allegiance and the university should develop policies that encourage 'dual citizenship'. Examples of this could include partnerships and collaborations with home and host universities and staff and student exchange programmes.

When respondents, in Phase 2 were asked if their expectations regarding their work situation are not met, 25.3% of respondents disagreed, while only 15.7% agreed. When asked if their expectations regarding their work situation have been exceeded, 25.3% disagreed and 21.7% had no opinion. These responses seem to indicate that expatriate academics are generally satisfied with their working environment, therefore implying that expatriate academics are well adjusted in terms of work. Howe-Walsh and Schyns (2010) argue that, in order for expatriates to be better prepared for the international career experience, they need to have realistic expectations of their work environment. Doherty, et al. (2008) found that accepting an offer of international employment is largely dependent on the individual's having a realistic idea of what to expect. This is where HR can be of support in the pre-departure phase by providing realistic living and work previews that will ensure the individual does not experience too much of a culture shock when arriving to take up a post here. From the results of Phase 3 of the study, HR specialists indicate that supplying this information does take place, even though it is not yet part of a formal process.

In Phase 2, there were no statistically significant differences in the perceptions of the dimensions of the expatriation experience between males and females, marital status, number of children, location of expatriate's family and years of experience as an academic. These results support the findings of Jokinen, Brewster and Suutari (2008: 985), whose study indicated that age, gender, period of international assignment, length of previous work

experience, organisational position and other factors did not correlate with a successful career experience.

The results of the current study do, however, challenge the findings of studies by Al Ariss and Ozbilgin (2010) and Rodriguez and Scurry (2014), whose results indicate that age, gender and ethnicity played an important role in the international career experience of highly skilled individuals as in this study there were no significant differences in the international career experience because of these variables. The results of the current study support the findings of Okurame and Fabuni (2013), who also found no significant differences in the career experiences of Nigerian nurses based on gender. There were also no statistically significant relationships found between academics reasons for relocation and their expatriation experience.

9.7.2 Sub-theme 2: Social support

In Phase 2, the relationships expatriate academics have with other expatriates, both in the community and at UKZN, was explored through responses elicited in response to the item ‘Other expatriates in the university community have expressed an interest in networking with me’. This item revealed a mean score of 4.39 (24.1% agreeing and 19.3% having no opinion). The item ‘other expatriates in the community where I live have expressed an interest in establishing contact with me’ revealed a mean score of 4.24 (30.1% having no opinion and 16.9% agreeing). These results indicate that other expatriates in the university and in the community at large do not form a closely-knit group nor do they socialise solely with one another. These results challenge the findings of Richardson and Mckenna (2002:69), who found expatriate academics “adhering closely together and socialising almost solely with one another”. The results also challenge the findings from the research on expatriate managers in which it is claimed that these managers often form closely-knit expatriate communities (Adler, 1997; Manev & Stevenson, 2001).

In Phase 2, those academics who have been in SA for 7-10 years have the highest mean score (mean=4.40) for their perceptions of university community support; those who have been in SA for 1-3 years were next (mean=4.33), followed by those who have been here for 4-6 years (mean=4.38) and finally those that have been here for over ten years (mean=3.21). These responses range from no opinion to disagreeing slightly regarding the level of support they have received from other expatriates in their work environment and community.

In Phase 2, the perception of university community support in relation to the field of study of respondents yielded significant results. Those academics in the School of Agriculture, Science and Engineering had the highest mean score (mean=4.33), followed by those in the Law and Management Studies (mean=4.26); then came those in the Humanities (mean=3.000) and finally those in the Health Sciences (mean=2.83). The responses range from academics' having no opinion in the Schools of Agriculture, Science and Engineering and Law and Management Studies, to those in Health Sciences who disagree that there was an acceptable level of support from the other expatriates in their work environments and their communities at large. However, overall, the responses to the questions about Support from other expatriates received positive responses (53%) but responses showed that there was no strong commitment to either a strong positive or negative outcome.

The results in Phase 2 of the study support the findings of Brewster (1995b), O'Grady and Lane (1996) and Selmer and Shui, (1997) that going to a 'close culture' can cause as many difficulties as going to a 'distant culture'. These findings echo Huckerby and Toulson's (2001) study, carried out in New Zealand, where participants reported difficulty establishing close friendships with host nationals. It is notable that the participants in that study were also from cultures that might be considered 'close' to New Zealand, namely, Canada and the USA. These findings add a dimension to this argument since even those from similar backgrounds do not socialise in a foreign country, so it is not only host country nationals who are difficult to socialise with. The majority of respondents in the current study are from Africa, which means that they are from cultures that could be considered 'close' to South Africa. This finding is consistent with the general xenophobic attitude exhibited in SA society towards foreigners. For example, this attitude was displayed prominently in an article by a senior academic at UKZN in 2013 (Ngcobo, 2013) as well as in recent xenophobic attacks. This finding is also consistent with the feelings of isolation and alienation experiences by an Indian academic at UKZN due to professional jealousy (Soobramoney, 2014).

Family and friends' support ranked the highest in terms of the mean scores. The statement 'maintaining close ties with family and friends back home' scored the highest mean score of 6.83 (32.5% agreeing and 44.6% agreeing strongly). For 'family and friends back home are supportive of the decision to expatriate', 32.5% agreed and 18.1% agreed strongly. Results show that expatriate academics in the current study seem to maintain strong ties with their home country. From the scale data (see figure 7.14), the majority of participants seem to

indicate that they have a have strong ties with family and friends in their home country. Keeping close contact with family and friends back home helps to prevent a sense of isolation and alienation.

In Phase 3 of the study line managers stated that the provision by the university of a start-up fund for new expatriate academics would help greatly assist them in making home visits, as their salary is just sufficient for living expenses and the cost of flights is prohibitive because of the current SA rand exchange rate. The results of Phase 2 of the study indicate a statistically significant difference in the component Support from Family and Friends for the 26-30 age group as opposed to the other groups. The 26-30 age group disagreed slightly ($m = 2.98$) that they received support from family and friends compared to the 31-35 group who agreed ($m = 5.83$), and the 36-40 group ($m = 5.23$), the 40-50 group ($m = 4.86$) and the 50+ group ($m = 4.85$) all of whom agreed slightly. The results of this study support the findings of studies by Al Ariss and Ozbilgin (2010) and Rodriguez and Scurry (2014), whose results indicate that age played an important role in the international career experience of highly skilled individuals. It would appear that those in the 31-40 age group are more inclined to value the support of family and friends during their international career experience.

Lee and Sokoco (2008:1193) define social support as “communication between recipients and providers that reduces uncertainty about the situation, the self, the other or the relationships and functions to enhance a perception of control in one’s life experience”. Due to the nature of international career experiences, expatriates are often forced to leave friends and family behind as they move to a new country. This can disrupt existing networks and force expatriates to seek out new support systems. Lee and Sokoco (2008) argue that organisational support, supervisor support and spousal and family support is critical and such social support would enhance the chances of successful adjustment. Successful adjustment has been linked to effectiveness by Feldman and Thomas (1991:277). The results of the current study indicate that, because expatriate academics perceive strong support from their counterparts at their schools, they are likely to have adjusted more quickly to their new work environment. The challenges and opportunities of having expatriate academics at the institution and at the school will now be discussed from a management perspective (with regard to the preceptions of HR and line managers).

9.7.3 Sub-theme 3: The challenges and opportunities experienced by expatriate academics during their career experience at UKZN as perceived by organisational stakeholders

An analysis of the findings of the qualitative phase of the study revealed that both academic line managers and human resource specialists perceive certain challenges that expatriate academics face.

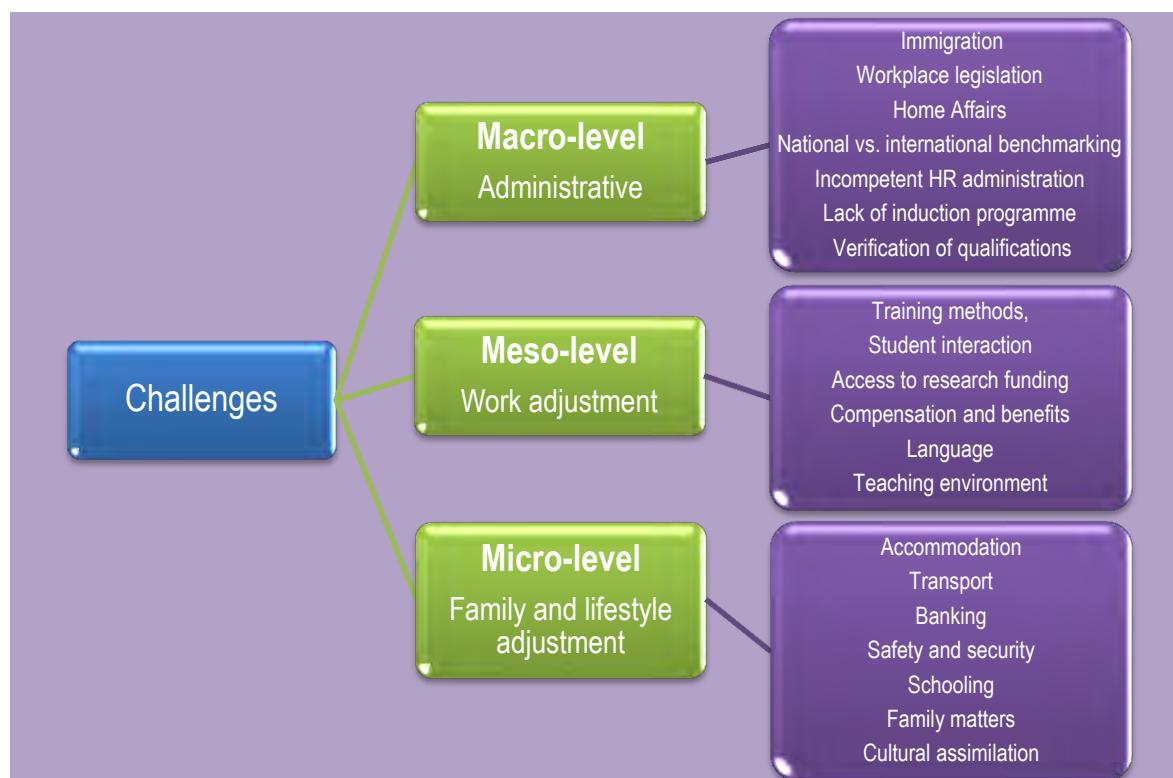


Figure 9-1 Challenges faced by expatriate academics as perceived by organisational stakeholders

Figure 9.1 represents the challenges that expatriate academics face, as perceived by human resource specialists (HR) and their line managers. These are categorised into administrative challenges (macro-level), workplace adjustment challenges (meso-level) and lifestyle and family challenges (micro-level). Each type of challenge will be discussed in turn below.

9.7.3.1 Macro-level – Administrative challenges

Figure 9.2 represents the administrative challenges expatriate academics face, as perceived by their line managers and human resource specialists.

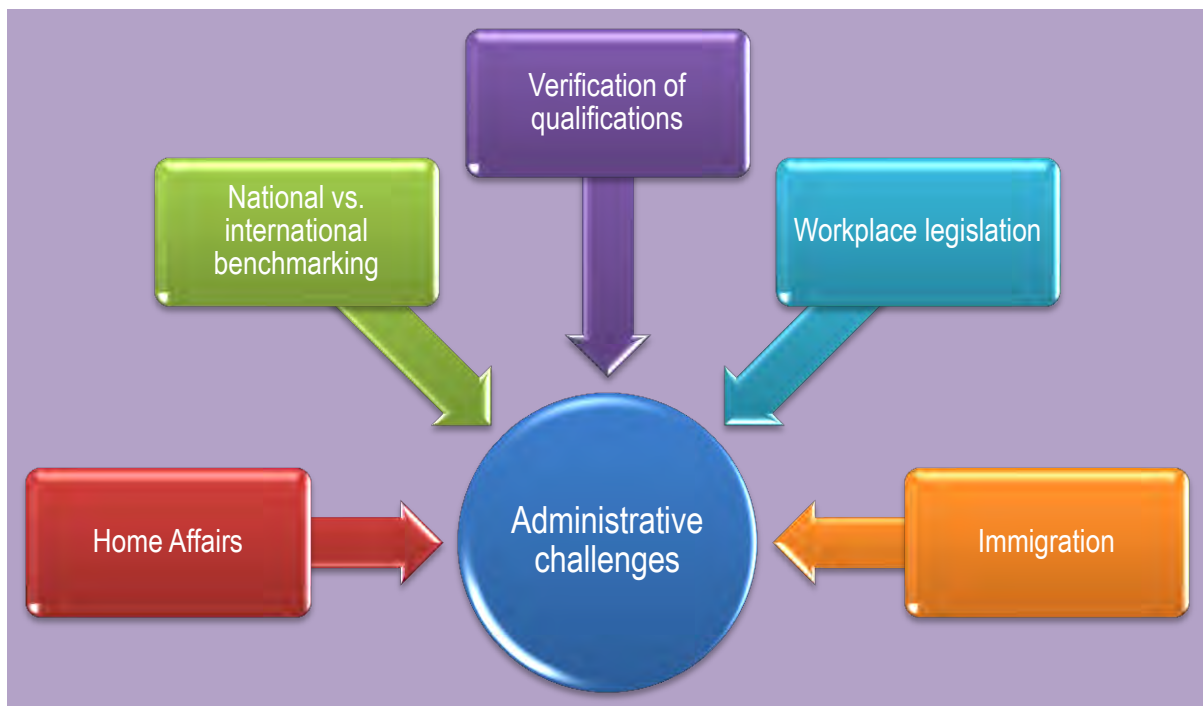


Figure 9-2 Macro-level: Administrative challenges

In the competitive and ever-changing world of higher education, there have been changes in the trends of expatriate management. Human resource professionals are being forced to re-examine their expatriate administration policies so that having expatriate academics at the university can continue to be viewed as beneficial to all parties. Administrative challenges exist in areas such as immigration, labour legislation and procedures at government departments responsible for processing applications of expatriate academics.

According to the participants from Phase 3 of this study, immigration remains the top priority and hence the biggest challenge for all parties concerned with the management of expatriate academics. In some cases failure to plan for proper immigration, such as obtaining the necessary work permits and adherence to financial regulations, may result in the expatriate academic being fined or even arrested. The securing of a work permit for expatriate academics is one of the top challenges identified by management (both academic line management and human resource specialists). Stern and Szalontai (2006) identify South Africa's restrictive immigration policy as well as various socio-economic and political factors as major obstacles in the recruitment of highly skilled foreign labour. The United Nations Department of Economic and Social Affairs, International Migration Policy (2013) supports this view as it finds that "South Africa's views on immigration and policies surrounding highly skilled migration need to be revisited in order to make it more competitive in a global market". Currently, the work permit application process is plagued by lengthy delays and

bureaucratic processes. The regulations set out in the policy for skills immigration are restrictive in many categories, “including quota work permits, application backlogs, evaluation of qualifications, police clearance, business permits, intra company transfer work permits, permanent residence permits/applications, and documentation” (CDE, 2007a).

Participants in Phase 3 of this study also highlighted SA labour legislation as one of the key challenges faced when attempting to recruit expatriate academics. SA labour legislation dictates that recruiters first attempt to find a suitably qualified SA for a position; only when no such candidate can be found, can they then recruit an expatriate academic. The university recruitment policy has been developed in line with current labour legislation. Designated groups are defined in the Employment Equity Act (1998) as “Black people (i.e. Africans, Coloureds and Indians), women and people with disabilities who are natural persons and are citizens of the Republic of South Africa by birth or descent (Employment Equity Act 55 of 1998, Republic of South Africa)”. Thus recruiters argue that the recruitment process becomes an administrative nightmare due to these legislative restrictions. It is only once recruiters find no suitable SA candidates that they can then expand their search to include foreign candidates. These findings are consistent with other international studies completed in France and Germany, where racial and ethnic discrimination in employment is a major obstacle for foreign workers (Osler and Starkey, 2005; Al Ariss, 2013). This situation is also similar to that found in Qatar, where locals are given first preference to employment and other resources (Rodriguez and Scurry, 2014:210).

Analysis of the SA context shows a very complex situation and the findings in the current study suggest that, despite official rhetoric regarding the need to service the scarce skills sectors of industry by encouraging foreign workers to immigrate to South Africa, in practice this approach is made extremely difficult by existing legislation. The findings of Phase 3 of the study also indicate that the bureaucratic processes and procedures at the Home Affairs department are lengthy and problematic. Incompetent staff and lengthy delays in processing of work permit applications often result in delays in the start of teaching programmes. Applications for work permits used to be processed at regional level, but now all applications have to be processed in Pretoria, where human resource specialists no longer have the luxury of establishing relationships with key stakeholders so that processes can be expedited. This situation is similar to that found in Qatar, where foreign workers are faced with bureaucratic and structural challenges (Rodriguez and Scurry, 2014:210).

In studies on the mobility of the highly skilled, it has been found that many of the such employees are not being fully utilised in their host country in terms of qualifications, level of skills and competencies (Al Ariss and Ozbulgin, 2010:281; Ramboarison-Lalao, Al Ariss and Barth, 2011:118; Rodriguez et al. 2014:200). In the context of UKZN, academic line managers argued that the bar is being set too high for academic level posts according to national and international standards. For example, for promotion purposes at any university, the requirements for senior lecturer and above involve publications and supervision experience as well as a doctoral qualification. At this university, certain additional conditions are attached, such as a pre-determined number of sole publications, rather than collaborative research with students or colleagues (UKZN, Promotions Policy). As shown in the findings of this study, academics from abroad have been noted to find it increasingly frustrating when they are rejected by the university, even though they are regarded as successful researchers in their own countries. Evidence of this is also found in Phase 2 of the study, where the majority of expatriate academics with 7-10 years of experience and doctoral qualifications hold lecturer and senior lecturer level posts.

When expatriate academics or even international students wish to enter a SA university, their qualifications have to go through a verification process by SAQA. SAQA is mandated by the National Qualifications Framework (NQF) Act to render a foreign qualifications evaluation and advisory service (SAQA, 2013:1). The evaluation process entails the comparison of the foreign qualifications with their SA counterparts in order to recommend recognition of the foreign qualification at an appropriate level of the NQF. The outcome of the comparison is presented in the form of certificates of evaluation and help decision makers in work and learning environments to resolve issues of recognition when faced with foreign qualifications that they cannot interpret.

“SAQA processes a minimum of 24 000 applications for the evaluation of foreign qualifications annually” (SAQA, 2013:1). Therefore the process can be a very lengthy one, which often puts pressure on HR managers, as vacant posts can mean that teaching and learning may be compromised. Results of Phase 3 of the current study revealed that many of the disciplinary cases at the university had to do with misrepresentation of qualifications even though there was no deliberate deception on the part of the incumbents, who had been taken on before the verification process had been finalised due to staff shortages only to discover later that their qualifications did not match the appropriate NQF qualification level as required, on the other hand there have been cases of deliberate deception.

While there is a dearth of literature in this area, it can be assumed that not many organisational practices are specifically designed to deal with SIEs. The approach of most organisations to SIE management can be classified as ‘ad-hoc’ rather than the result of an established policy. Howe-Walsh and Schyn (2010) state that it is critical for the organisation support the successful adjustment of SIEs. HR management can support the adjustment of SIEs to their new environments positively.

In this section, the administrative challenges that expatriate academics face as perceived by their line managers and human resource specialists have been examined. In the following section, the family and lifestyle challenges expatriate academics face, as perceived by their line managers and HR specialists, will be examined.

9.7.3.2 Meso-level – Workplace adjustment challenges

Figure 9.3 below indicates the work adjustment challenges facing expatriate academics as perceived by their line managers and human resource specialists.



Figure 9-3 Meso-level: Work adjustment challenges

Huang et al. (2005) and Toh and DeNisi (2007) point out that the manner in which local colleagues interact with SIEs impacts on the successful adjustment of the latter. Earlier results from Phase 2 of the study have showed that expatriate academics have positive

perceptions of the support they receive from their colleagues. It is critical to avoid any misunderstandings that could lead to conflicts and local colleagues should provide support in terms of what are acceptable local norms, values and behaviours (Vance, et al. 2009:649). Organisational culture that is tolerant of foreign employees and values the benefits that they bring will greatly improve the rate of SIE adjustment (Huang, 2005; Toh et al., 2007; Vance, 2009).

In Phase 3 of the study both line managers and HR specialists agreed that a strong accent, poor pronunciation of words and lack of proficiency in English were major challenges when managing expatriate academics. Line managers recalled occasions when students, themselves often second or even third language English speakers, had complained about the strong accents of expatriate academics. Line managers found it was particularly expatriate academics from Eastern European and Asian countries who presented problems in terms of language for the reasons listed above.

Language problems are well documented as one of the many challenges expatriates face when taking up overseas assignments (Aycan, 1997; Ashmalla, 1998; Kapadia, 2009). Foreign language training is often part of the pre-departure training that organisations give their expatriate managers once they have been selected for an overseas assignment (Adler, 2008; Tharenou, 2008; KPMG, 2013).

The findings also indicate that expatriate academics have difficulties with regard to English language proficiency. This means that their understanding of English and how they use the language may often be culturally incorrect. In the SA context, English words may take on culturally specific meanings and expatriate academics may find themselves unaware of the different meaning associated with particular words. Thus English proficiency may take on a cultural dimension which expatriate academics are unaware of as there is no language training offered by the university upon selection. Hofstede and Hofstede (2005:1) call this cultural dimension the “software of the mind”. The strong accent of many expatriate academics has been the source of great consternation according to line managers as well as HR specialists, especially during the interview phase of the recruitment process. A senior HR specialist shared an experience where the heavy accent of a candidate at an interview interfered with understanding. Therefore it is clear that language proficiency and accent are key challenges that face expatriate academics at the university. This is a common problem faced in expatriate management as well, and has been overcome by engaging new incumbents

in foreign language training (Shen 2005; Osman-Gani and Hyder, 2008). These results are interesting, as SIEs choose to relocate to a particular host country and organisation, and thus one would assume that they would have no problems with English as a medium of communication, therefore this was not a problem the researcher expected to encounter in this study.

The results of Phase 3 of this study show that expatriate academics find it challenging to teach in the SA higher education context. Line managers explained the difficulties faced by expatriate academics, such as the quality of students. Many students come from disadvantaged backgrounds and as such present the academics with unique challenges. The command of the English language on the part of the students may be such that they are unable to grasp simple instructions or follow class discussions. There may also be different levels of understanding in the student body in the classroom as SA higher education seeks to provide access for the masses and is not the domain of the few (IEASA, 2011; Regenesys, 2013). Another challenge is the extremely large class sizes, especially in undergraduate classes, where individual interaction between student and lecturer is often missing. Academics, both expatriate and SA, are often restricted in terms of equipment that is available and as a result have to adapt their teaching style; this may prove difficult, especially in practical disciplines like chemistry, agriculture and engineering. These findings are supported by Prof Ian Scott of the Center for Higher Education Development at UCT, who suggests that less than ideal staff to student ratios is bringing about deterioration in academia. Similarly, HESA recognises that academia is not attractive as a career option because of relatively low salaries, expanding student numbers and heavy workloads (Jansen, 2013). Academic line managers in Phase 3 of the current study also found that expatriate academics, especially those from Francophone countries were accustomed to different pedagogical styles led to further adjustment problems when faced with the SA methods of teaching and learning, such as the use of more practical teaching methods in health sciences.

Both line managers and HR specialists in Phase 3 of the study highlighted the challenges faced by expatriate academics in terms of access to research funding. Academic line managers argued that many new expatriate academics were unable to start doing research since funding was not immediately available when they joined the university. Furthermore, the majority of available funding is reserved for SA citizens. Another challenge for the expatriate academic is that funding once approved is slow to come through, as the application is a competitive process. Line managers revealed that often the school and or the line

manager themselves assisted academics by funding them through their own research monies. Expatriate academics in Phase 2 of the study supported these findings when they responded to the item that their schools helped them pursue their research activities (mean=4.73, sd. = 1.69, 27.7% agree slightly, 24.1% agree). Furthermore, these findings are also supported by other studies by Foote, Li, Monk and Theobald (2008:167), who indicate that expatriate academics often face critical funding shortages at the start of their careers, as well as by Cloete, et al. (2011), who argue that funding is disjointed or inadequately coordinated with national policy. It is therefore a lengthy and laborious process to apply for funding and there is no guarantee that the applicant will be successful.

HR specialists also raised the lack of competitive remuneration packages to attract highly skilled expatriate academics to the university. Currently, the university remuneration packages do not compare favourably with other national institutions nor do they compare with international benchmarks (Grobler et al. 2006). This issue has been flagged as one of the major challenges recruiters face when trying to attract potential employees to UKZN. However, for academics in Phase 2 of the study, this was not a major issue, the component financial reasons (mean=2.89, sd.=1.39). In response to the item, 'Better Salary' on the Motivation to Expatriate sub-scale, the majority of respondents attached a moderate level of importance to it (24.4%), while 22% of the sample indicated that it had no influence on their decision to relocate.

Line managers found that expatriate academics often problems with socio-cultural adjustment in SA. In the literature this is referred to as work adjustment (Bhaskar-Shrinivas et al, 2005:257). Expatriate academics found it difficult to adjust their expectations of day to day operational matters, like email etiquette and access to computers, telephone and printers. Line managers also found that in some cases the editorial standards of expatriate academics lagged behind SA standards, to the point where students picked up discrepancies in question papers and suggested solutions.

Management literature strongly recommends some form of orientation and/or induction training for new incumbents (Tung, 1998; Sparrow et al. 2004; Shen, 2005). The most popular of these are cross-cultural training and foreign language training (Ashmalla, 1998:58). This sort of provision is even more important to SIEs, who, since they are not part of the organisation before they come to the host country, cannot be provided with any kind of pre-departure training such as cultural awareness or language training. This has to be done once the SIE gets to the host organisation. Also included in this pre-assignment training is

work-related training and lifestyle-orientated training, which will assist incumbents to settle into their new environment quickly. This type of training will greatly assist the expatriate to achieve what Black (1998:278) terms work and general adjustment. However, as Shen (2005:660) points out, many organisations do not engage in orientation or induction training because not only is it not thought to be warranted or effective but there is also little opportunity to offer such preparation; in addition, there is a belief that someone who is considered appropriate for a position does not need special training.

The results of the current study show that this lack of formal orientation training specifically for expatriate academics is also the case at this university. This reluctance to provide training seems to be the case at UKZN as well, as there is currently no formal orientation or induction programme that is designed to specifically meet the needs of expatriate academics. However, the findings make it clear that this lack is a major challenge to expatriate academics, who often find themselves left to their own devices in adjusting to their new work environment and their new living environment. This seriously hampers their ability to adjust successfully and perform at their best (Ball et al., 2008:19).

Coupled with the fact that there is no formal induction or orientation programme designed to meet the needs of expatriate academics, line managers in the current study have also highlighted the inept and inefficient services provided by the HR department at the university as a major challenge faced by expatriate academics. The HR department at the university does not have a special division equipped to handle specific issues related to expatriate academics who are treated like any new employee and have to take sole responsibility for dealing with any difficulties in accessing information or knowing what to do. This type of situation has been highlighted by the current minister of Home Affairs, Naledi Pandor, who stated the need for South Africans to make foreigners feel welcome as they are here to fulfill a critical need. South Africa with its current skills shortages and the need to create jobs and skills development has “to make them feel welcome” (cited in Hartley, 2013:1). This again serves as a reminder of the large difference between official discourse and the actual situation in practice.

Many theorists have contributed to the study of culture shock, among them Hofstede and Hofstede (2005:1), who explain behaviour and reasoning as being regulated by people’s moral codes, beliefs and traditions. The direct effects of the differences in these values as experienced by the expatriate leads to a general psychological uncertainty about how to behave and communicate with people (Juhl and Fuglsig, 2009:6).

9.7.3.3 Micro-level – Family and lifestyle adjustment challenges

Figure 9.4 represents the family and lifestyle adjustment challenges expatriate academics are perceived to experience by their line managers and by HR specialists at the university.

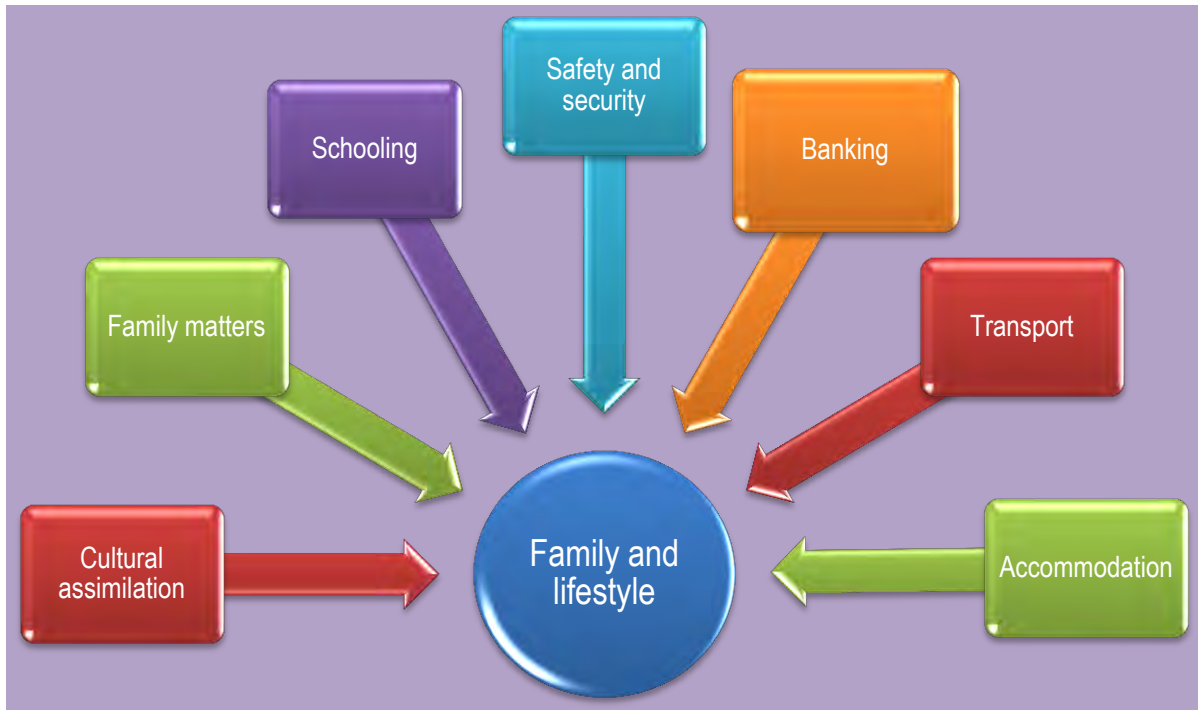


Figure 9-4 Micro-level: Family and lifestyle challenges

Expatriate academics experience similar challenges to other expatriates when adjusting to life in a new country. Participants in Phase 3 of the study (HR specialists) described some of these challenges, such as creating a financial profile by opening a bank account, which may be a challenge in view of the bureaucracy involved and the incompetence of bank officials, securing accommodation, using public transport and finding schools for children. According to the participants in Phase 3 (academic line managers), it was a big adjustment for many expatriate academics to discover that they could not depend on the public transport system in SA and would have to purchase a car in order to be mobile. HR specialists argue that motor vehicles are very expensive in SA, expatriates found that they were unable to afford to purchase a vehicle soon after arriving here. The changes in what are accepted ways of banking, shopping, schooling and socialising are often associated with outward displays of ‘culture shock’. McCall and Hollenbeck (2002:1) describe it as “deeper differences in customs, mentality, world view and interpersonal interaction in a new cultural setting where one’s own values are brought into question”.

South Africa has been portrayed in the media as a violent country. Moreover, because of the large disparity between the socio-economic classes, crimes like high-jacking, muggings and break-ins are common crimes. These tend to be opportunistic in nature and often expatriate academics do not share the same level of awareness as locals when it comes to personal safety and security. As a local, one becomes aware of certain areas which one should not venture out in. For example, it is not safe to walk to the local neighbourhood spaza shop at night in certain areas as this can be dangerous because of opportunistic criminals. As an expatriate one is not aware of this, unless it is pointed out by a local. This aspect of adjustment is termed interaction adjustment and involves changing perceptions about how we view local residents (Black, 1998). HR specialists in Phase 3 provided examples of how expatriate academics fell victim to opportunistic crimes because they were unaware of the dangers.

In the literature regarding expatriate management, the role of family is critical in determining the success or failure of an assignment. Many researchers have highlighted the role family plays in the expatriation experience (Riusala et al. 2000; Richardson, 2004; Tharenou, 2008). Researchers like Moore (2002) recommend that the family be included in selection and training procedures. Family members play an important role in the pre-departure phase of the expatriation cycle as they influence the expatriate's decision to accept the assignment or not (Adler, 2008). The family, the employee and the organisation are interrelated to such an extent that any change in one would result in an impact on another (Dupuis et al., 2008). Thus, any disruption to family life can have a devastating effect on an expatriate's work life, as Wang and Bu (2004:36) found in their study. According to HR specialists in Phase 3, UKZN pays particular attention to arrangements for the family when relocating an expatriate academic. If these new employees are bringing their families to live with them in SA, then the university assists by organising flight bookings for the entire family. UKZN assists the new employees with location of schools and pay for two school uniforms per child. The university provides information about accredited estate agents to contact for rental properties and bed and breakfast establishments in the area. The university also pays visas for employees and their families and shipping costs of furniture and cars are also covered. The assistance offered by the university is guided by the Relocation Policy, which applies to both foreign and local employees (UKZN, 2014).

However, results from the current study indicate that it is only at the pre-departure phase of the employment cycle that the university concerns itself with the family. Responses from HR

specialists indicate that concerns surrounding the family were not given consideration during the recruitment and selection phase, nor are they of significance to the university when the candidate has actually taken up the position.

In order for expatriates to be successful in their posts, they have to have, in addition to proper training, effective managerial skills and administrative competencies, the ability to be flexible and adaptable, with an open mind and strong interpersonal skills (Black et al., 1999; Kapadia, 2009). According to the findings of this study, the consensus among both line managers and HR specialists is that the success with which candidates adapts to their new work and living environment seems to be critical in how effective their expatriation experience is.

9.7.4 Sub theme 4: Opportunities associated with managing expatriate academics as perceived by their academic line managers

Academic line managers identified a number of opportunities in managing expatriate academics in their disciplines. These opportunities are directly associated with the workplace, therefore they can be classified as workplace opportunities. These include international experience, international networks and collaboration on research and teaching, innovation and creativity, provision of scarce human capital, curriculum development with an international flavour and the opportunity to rapidly progress on their academic career path. The most important opportunities are discussed in detail below.

9.7.4.1 Expatriate academics as experts

Several interviewees suggested that the differences in perspectives, life experiences and standards of practice that expatriate academics come with enrich the teaching and learning experience for both students and local academics. From line management perspective, the expatriates introduce new ideas and this helps to eliminate stagnation and to introduce local staff to international experiences, thus permitting creativity and innovation in both teaching and research. This supports the findings of Oyewole (2009), who identified as reasons for promoting international academic mobility, the development of human resources, research and regional co-operation. These findings are similar to those of Kotecha, Walwyn and Pinto (2011) and Kotecha et al (2012b) who indicates that a well-defined and carefully implemented regional academic mobility plans can revitalise higher education and contribute to the transformation of the region and the requirements of a knowledge society.

9.7.4.2 Possession of valuable social capital

In Phase 3 of this study, line managers acknowledged the valuable networks and collaborative research opportunities that expatriate academics bring to their discipline because of their international exposure. According to line managers, curriculum development is greatly enhanced by having academic expatriates in the discipline. Having academics with international experience in both teaching and research helps to create an internationally acceptable curriculum for local students that is aligned with international best practice. Line managers saw clear career trajectories and support by management and government for research as opportunities that expatriate academics value at the university. These findings support previous studies and document reviews, for example, the UNESCO/ADEA Task Force for Higher Education and Research in Africa, which suggested that “higher education institutions need to be more contextually relevant in their curriculum and their delivery to the students” (UNESCO/ADEA 2009:33). The task force also observed that institutions should be “supported to serve the priorities and needs of Africa’s development through [a] socio-culturally relevant curriculum and curriculum delivery, particularly in the fields of Science and Technology”, while at the national level, “development plans should match graduate output with national human resource needs in order to minimise graduate unemployment” (UNESCO/ADEA 2009:34).

9.7.4.3 Solution to critical skills shortages

According to line managers in some disciplines, expatriate academics are invaluable because without them many programmes would be understaffed and this would lead to a comprised teaching and learning situation and even a complete shutdown of the academic department. This finding supports the study by Kotecha et al (2012a) that revealed staff shortages in the higher education landscape, particularly in the science, engineering and technology fields, followed by the health sciences, business management and law and agriculture. The results of Phase 1 of study prove that skills shortages in the science, engineering and technology fields exist and that expatriate academics are being sourced to fill these gaps. These fields are found on the 2012-2013 Scarce Skills List published by the Department of Labour (DOL) (Kotecha, et al. 2014).

The line managers also value having expatriate academics in their disciplines because of their strong work ethic. Many line managers commented that expatriate academics were always willing to work late and take on additional responsibilities. This can be explained using the

results of Phase 2 of the study, as the result of their lack of social ties to their community and to other expatriates in the university since the survey indicates that the greatest perception of support for the expatriate academics came from their school. This finding is linked to the motivation of the majority of the respondents in this study whose primary motivation to come to South Africa was for career building purposes as well as the career attitudes of the expatriate academics in Phase 2 of the study.

9.8 Conclusion

Firstly, an investigation of the demographic profile of academic staff in SA higher education was conducted over three years, 2005/2010/2012. This was done in order to examine the demographic trends for this period for academics in SA higher education, so as to compare the characteristics of SA and expatriate academics. In addition, UKZN as the context for the case study was examined over the three years in order to track the trends in terms of the demographic profiles of their SA versus their expatriate academic staff.

National survey results revealed that there were no significant differences in age between SA and expatriate academics nationally over the three years. However, when examining the age of academics (SA and expatriate), it is clear to see that it is a truly heterogeneous group of individuals. Closer examination over the three years indicates that gender patterns are skewed since there are more male than female academics employed in SA higher education institutions. This is indicative of the gender bias that presents a perennial problem globally, where women are still prejudiced in terms of employment opportunities. However, it is understandable as, historically, SA women, especially those from disadvantaged backgrounds, were not given the opportunity to further their education after completing matric as they were expected to take on roles as homemaker and wife. However, at UKZN it is heartening to see that over the three years there have been more female SA academics employed. This is a tribute to the implementation of the transformation policies at UKZN.

A comparison of the academic qualifications of SA and expatriate academics over the three years indicates that expatriate academics are more highly qualified than their SA colleagues, as the majority of the former hold a doctoral degree. This trend implies that the expatriate academics in SA higher education are part of a 'highly skilled' group of SIEs who through their own 'free will' relocate to South Africa. This trend provides evidence that South Africa

is suffering a skills shortage in almost every aspect of the economy. By recruiting appropriately qualified expatriate academics, SA higher education institutions are able to continue to provide teaching and learning programmes in order to educate future SA employees to fill the skills gap.

The majority of expatriate academics are recruited from SADC countries as well as other African countries. Interestingly enough, the next most frequent major supply region of expatriate academics to South Africa is Europe. Perhaps this is because of historical ties with the UK; this could warrant investigation in future studies. In future, perhaps expanding the talent pool globally to include other regions may assist SA higher education institutions to become truly diverse universities reflecting the true spirit of transformation.

WITS and UCT were consistently ranked first and second in terms of the number of expatriate academics employed over the three years. Both these universities are ranked in the top five SA universities and have performed consistently in the world university rankings in recent years. Both are among the top five universities in South Africa in terms of their research outputs as well as the number of PhDs per member of staff. This indicates that this is a 'pull' factor that has attracted expatriate academics to these institutions. Upon examination of the demographic profile of the sample, it is clear that it is representative of the institutional and national surveys (with the exception of the gender patterns).

Secondly, an investigation into the motivation behind the expatriate academics' decision to relocate was carried out. These findings have addressed the gap identified by previous authors by providing accurate quantifiable information about the motives of SIEs, in this case expatriate academics. These findings suggest that there is no one primary motivation but rather a variety of motives at any given life stage or career stage that may together motivate expatriate academics in general. The motive Career appeared to be dominant among the respondents in this study, closely followed by Adventure/Travel and then Financial. These three motives appear to be the dominant themes in the Motivation to Expatriate for the academics in this study. The subsidiary themes appear to be Life Change, Concerns for Safety and Security of Children and Family. Respondents did not feel that their decision to relocate was based on a need for personal transformation nor did they attach any family concerns, be it about spouses, parents or children, to their decision. Results seem to indicate that the majority of respondents could be classified, in terms of Richardson's (2002) metaphor, as 'architects' since they primarily expatriated in order to build their careers. Selmer (2013) would interpret this as a cognitive motivation. The implication of this

categorisation for management would be that the expatriate academics are much more flexible and open to new experiences and are able to endure challenges in a productive manner.

Thirdly, the individual career experiences of expatriate academics in this study indicate that the majority are well adjusted in terms of their relationships with their host country colleagues and their relationships with family and friends back home as well as in terms of the fulfillment of their expectations regarding work. They did, however, indicate that their experience of organisational support could have been improved during their experience as well as during the pre-departure phase. Unlike previous studies, the results of this study indicate that expatriate academics do not share close ties with other expatriates or local South Africans in the university community or within the communities in which they lived. This has been attributed to the xenophobic attitudes and professional jealousy that exist in SA society at large. This was particularly true of those academics in the School of Agriculture, Science and Engineering. The results of the study challenge the conclusions drawn from work done by Al Ariss and Ozbilgin (2010) and Rodriguez and Scurry (2014), where age, gender and ethnicity influenced the career experiences of self-initiated expatriates.

Fourthly, expatriate academics had to deal with many challenges during their career experience here in South Africa. These have been discussed across three levels, macro- (administrative), meso- (work adjustment) and micro-level (family and lifestyle adjustment). This proves that SIEs face many challenges that hinder their ability to expatriate and have positive career experiences. Expatriate academics have been traditionally grouped as SIEs who have “an independent and proactive role in managing their own careers”.

The PBCA scale was developed by Briscoe and Hall (2006) and adapted for use in an academic setting. The results from the use of the scale in the current study indicate that respondents exhibit a protean career attitude which suggests that they are “able to develop a greater adaptability and self-awareness thereby ensuring a proactive smart employee” (Briscoe and Hall, 2006:16). These results confirm the results of the Expatriation Experience sub-scale in which it was found that the respondents were well adjusted to their work environment. The respondents in this study are best described ‘solid citizens’ in terms of the Career Profiles of Contemporary Career Agents (see Table 3.4) developed by Briscoe and Hall (2006). This implies that these individuals are protean in the approach to their careers and are willing and able to explore their career environment but are equally committed to remaining in a stable work environment. Ideally these are the type of SIEs organisations

want to work for them and such organisations would need to develop policies and processes to accommodate them.

Fifthly, the major opportunities, according to management, presented by having expatriate academics at UKZN include access to subject matter expertise, diversity and a wealth of knowledge and experience. These academics also bring with them valuable social capital in the form of resources like networks of contacts, collaborative research opportunities and innovative curriculum development. Above all else, they serve as the solution to the critical skills shortages South Africa is facing particularly in the fields of science, engineering and mathematics.

In conclusion, the study has attempted to create insight into a previously unknown area of research in South Africa, namely, the phenomenon of expatriate academics, by examining the demographic profile of academia in South Africa, the motivations for expatriation, expatriate academics' career experiences and career orientation as well as the challenges and opportunities encountered during the career experience.

Chapter 10

Conclusions and Recommendations

10.1 Introduction

This chapter integrates and consolidates the findings from the data analysis discussion into a model of best practice in terms of managing scarce human talent in the form of highly skilled and highly qualified academics. Expatriate academics present a solution to SA and UKZN's staff and skills shortages in scarce skills disciplines and this has become apparent through the research process. Thus it has implications for management; organisational transformation; and research into SIE management. The aim of the chapter is to draw conclusions from the study, based on the findings from the research and informed by the comprehensive review of the literature. The limitations of the research and directions for future research are included as part of this chapter. The implications of these findings are discussed in relation to the improvement of the career experience of expatriate academics at UKZN, both for management and individuals alike. In this way, a significant and original contribution of this research, not only to the body of knowledge, but also to the practice in relation to organisational development and talent management, is presented. The chapter is structured around the following headings:

- Conclusions relating themes, research aims and objectives to conceptual framework
- Recommendations
- A model of Global Talent Management
- Original contribution of the study
- Limitations of the Study
- Directions for Future research
- Chapter summary

10.2 Conclusions

This section presents the concluding remarks regarding the outcomes of the study according to the aims and objectives of this research.

10.2.1 Aim 1: To explore the staffing trends amongst academics at South African Higher education institutions over three years 2005/2010/2012

10.2.1.1 Research objectives

1. To investigate the demographic profile (age/gender/qualification/country of origin) of expatriate academics in South African higher education institutions over three years 2005/2010/2012

Results of Phase 1 of the study found that expatriate academics in SA fit the profile of SIEs, in that they are younger than their local colleagues and are highly qualified, the majority of expatriate academics in SA higher education holding doctoral degrees. In contrast to Suutari and Brewster's (2000) profile of SIEs, the majority of expatriate academics in SA are male. This actually supports trends in migration studies where the majority of immigrants are male, especially with migration from other African countries to SA. The majority of expatriate academics come from African and European countries across all 23 publically funded universities in SA. UKZN patterns also indicate this pattern, with Zimbabwe being the largest single country supplier of academics to the university.

2. To determine the ranking of South African higher education institutions in terms of the number of expatriate academics employed and their countries of origin over three years 2005/2010/2012

WITS was ranked in pole position and UCT was ranked second, over the three years examined in terms of recipient universities of expatriate academics. In 2012, UKZN was ranked third amongst all the public universities in terms of the number of expatriate academics employed. The reasons for this include the attractiveness of the host institution in terms of reputation (research and teaching) and location. Both these universities are ranked amongst the Top 500 in the world according to international rankings scales. Zimbabwe has been the largest single country supplier of expatriate academics to SA institutions of higher learning over the three years. Other major suppliers were Europe, Asia and the Americas. Jansen (2013) found that the majority of African academics were migrating to South Africa and western countries because of a deterioration in working conditions, political and socio-economic instability.

3. To compare South African academics to expatriate academics in terms of qualifications, age and gender over three years 2005/2010/2012

When SA academics are compared to expatriate academics over the three years across all 23 publically funded universities, no statistical differences were found across age categories. However, expatriates were found to be slightly younger than their local colleagues. Both the majority of SA academics and expatriate academics are males. Expatriate academics hold more doctoral degrees than their local colleagues over the three years examined. SA academics hold more Masters, Honours and post-graduate degrees than their expatriate colleagues.

4. To compare South African to expatriate academic staff at UKZN in terms of age, gender, qualification, field of study and level of academic post for 2005/2010/2012

At UKZN, no significant differences were found amongst the average ages of SA and expatriate academics over the three years. However, the average age of expatriate academics was lower than the national norms over the three years. The majority of expatriate academics at UKZN fell into the 40-49 year age group. In terms of gender, at UKZN there are more female SA academics than males over the three years examined, unlike national trends. However, there are still more male expatriate academics than females employed at UKZN over the three years. Over the three year period, 69.58% of expatriate academics at UKZN held doctoral degrees in comparison to their local counterparts (36.9%). The trend at UKZN is similar to that of the national norms in that more SA academics hold Masters, Honours and other post-graduate qualifications than their expatriate colleagues. At UKZN, the majority of expatriate academics belong to the College of Engineering, Science and Agriculture which is made up of disciplines that are on the Scarce Skills List (Kotecha et al, 2014), which implies that expatriate academics are there to service the skills and staff shortages in these disciplines at UKZN. The majority of expatriate academics at UKZN hold lecturer posts (35.1%) with very few holding management or leadership positions. This could be interpreted as indirect discrimination based on ethnicity as it appears that nationality and ethnicity are a limitation to career progression.

10.2.2 Aim 2: To explore the nature of the international career experiences amongst expatriate academics at UKZN

10.2.2.1 Research objectives

5. To determine the motivating factors that led to the decision to relocate among expatriate academics at UKZN

The results of the survey in Phase 2 of the study indicate that Career Matters were the strongest motivating factor to relocate to UKZN and SA amongst the sample. This was followed by Seeking Adventure and Travel Opportunities and Financial Reasons that were ranked second and third respectively. Lifestyle Changes and Concerns for the Safety and Security of Children were ranked fourth and fifth respectively. However, the mean scores of these reasons for relocation indicate that the scores were very close hence supporting the premise that a variety of factors can influence an individual's decision to relocate to another country (Thorn, 2009, Ackers, 2005). These results illustrate Ackers's (2005) premise that "the menu and significance of factors might change over time as careers develop and lives evolve". Respondents in the study are classified as 'architect's according to Richardson's (2002) metaphors to describe expatriate academics reasons for relocating, implying that they have come to SA and UKZN for career building purposes, in order to make themselves more marketable and increase their employability profile. The majority of respondents in the study exhibited what Selmer and Luring (2013) call cognitive reasons for relocating, therefore these academics would have an easier time adjusting to their new work environments than contemporaries who relocated for affective reasons.

6. To investigate expatriate academics experiences of organisational and social support during expatriation at UKZN

Expatriate academics maintain close ties with their family and friends back home and they also have good relationships with their colleagues in their respective disciplines. Using Black and Gregersen's (1991) model, the sample of expatriate academics seem to illustrate a 'dual citizen' profile of adjustment. This implies that expatriate academics in the sample have successfully adjusted to their work environment at UKZN and that the university should develop policies that help to support this continued success in order to retain this scarce human capital. Even though overall the respondents indicated positive perceptions of organisational support, the individual scoring illustrates that more could be done by the university. For example, line managers have recommended a start-up fund be allocated to

new expatriate academics in order to maintain their close ties at home and to begin their research as funding for research tends to be on a competitive basis.

Respondents felt that they do not share close relationships with other expatriates in their communities or with the university community at large. These results challenge the findings of studies done by Adler and Gunderson (2008) and Osman-Gani and Rockstuhl (2008). They do, however, support the findings of Selmer and Shui (1999) and Selmer and Luring (2013b), who found that isolation and alienation were the norm even when individuals relocated to cultures similar to their own. This can be largely attributed to the xenophobic attitudes prevalent in South African society at large, where locals feel that foreigners are here to usurp their work opportunities and, as a result, foreigners tend to isolate themselves from each other and from locals.

Expatriate academics in the sample reported that their expectations in terms of their work situation were being met. According to Howe-Walsh and Schyns (2010), cognisance of this need has to become part of the formal support programme that organisations need to offer to ensure satisfaction and retention. Expatriate academics in the study found particular issue with the pre-departure phase of the expatriation experience and the majority responded negatively to the level of support offered by the university during this phase. Therefore, in terms of organisational support, much more could be done during this phase.

7. To determine the career orientation of expatriate academics at UKZN

The results of the study have confirmed that SIEs possess a protean career attitude. This implies a proactive personality and thus an ideal type of employee who can respond to challenges in the workplace in a proactive manner. Expatriate academics also exhibit the ‘solid citizen’ career orientation. This has implications for managers and the organisation in terms of needing to value their contributions while providing career development opportunities and organisational support so as to ensure organisational loyalty and commitment.

The position taken in the literature assumes that “the positioning of SIEs (and by implication those with a protean career attitude) as global citizens with limited organisational commitment has implications for the support they receive to manage and develop their careers” (Rodriguez and Scurry 2014:205). The results of the current study challenge these assumptions as the respondents have shown that they do not have a high organisational mobility preference.

These findings show that context plays an important role when determining the career attitudes of academics. This may not necessarily be as individualistic an outlook as suggested by the PBCA theorists. An individual's attitudes are shaped by the circumstances surrounding them, and from this study it is clear to see that macro-level, meso-level and micro-level challenges shape the career attitudes of expatriate academics. Results showed that these academics have a low organisational mobility preference this shows that to these academics boundaries are important, not just physically but psychologically as well because of their personal circumstances have a stable home base is important to them. In fact they serve not to hinder personal development but rather to shape it in a positive manner.

8. To determine whether demographic factors such as age, gender, location of expatriate academic's family, years of experience as an academic, duration of expatriation experience and field of study influence expatriate academic's motivation to expatriate, international career experience and career orientation at UKZN

Using inferential statistics, no statistically significant results were found for the components of the Motivation to expatriate sub-scale and the different categories of age amongst respondents. However, the overall score of the sub-scale was found to have weak statistically significant relationship with the age categories of the academics in the sample. Results illustrate that there were no statistically significant differences between the components of the Motivation to expatriate sub-scale and the gender, marital status, number of dependents, duration of international career experience and fields of study of academics in the sample. Statistically significant results were found for the component, financial reasons ($t=2.13$; $p>0.05$) of the Motivation to expatriate sub-scale and the location of the expatriate's family, those whose families were here in SA scored a higher mean score (mean=2.97) than those whose families were not in SA (mean=2.30). Significant results were also found for the component career matters ($f=3.88$; $p>0.05$) and categories of years of experience, where the highest mean score was for those with 1-5 years of experience (mean=4.0), followed by those with 6-10 years of experience (mean=3.5), then those with 11-15 years of experience (mean=3.22) and finally those with 16+ years of experience (mean=2.99).

Using inferential statistics, statistically significant results were found for the component, Family and friends support ($f=4.78$; $p>0.05$) of the sub-scale and the different categories of age amongst respondents as well as the overall score of the sub-scale ($f=2.77$; $p>0.05$) was found to have weak statistically significant relationship with the age categories of the academics in the sample. So too the components of pre-departure phase experience ($f=4.66$;

$p > 0.05$), school support ($f = 2.97$; $p > 0.05$), university community support ($f = 2.96$; $p > 0.05$) as well as the overall score ($f = 2.97$; $p > 0.05$) and the duration of the international career experience. Statistically significant results were found for the family and friends support ($f = 4.42$; $p > 0.05$), university community support ($f = 3.11$; $p > 0.05$) and the overall score ($f = 5.13$; $p > 0.05$) and the field of study.

Unfortunately, no statistically significant differences were found between the components of the sub-scale and gender, marital status, number of dependents, location of expatriate's family and years of experience as an academic.

Using inferential statistics, statistically significant results were found for the Values-driven sub-scale ($f = 3.50$; $p > 0.05$) as well as the overall career attitudes scale (mean = 3.96) and the different categories of age groups amongst respondents. Those in the 31-35 year age group indicated that they used their own values to some extent (mean = 3.21), while the 36-40 year age group and the 50+ age group use their own values to a considerable extent. The 41-50 year age group uses its own values to some extent when compared to the 36-40 year age group. Overall, those respondents in the 31-35 year age group displayed career attitude components to some extent compared to the 36-40 year age group. Those in the 41-50 and 50+ year age groups both displayed the components to some extent, while the 36-40 year age group displayed the components to a considerable extent. This once again reveals that the life stage at which expatriate academics are determines their career attitude, and once again it is based on circumstances not purely an individualistic outlook.

A significant difference was found for the BM sub-scale of the PBCA (Briscoe et al, 2006) and the categories of the number of years of experience as an academic ($f = 3.36$; $p > 0.05$). Those respondents in the 11-15 year category had the highest mean score (4.25), and consider that they have a boundaryless mindset to a considerable extent. Those academics with 1-5, 6-10 and 16+ years of experience, considered themselves as having a boundaryless mindset to some extent. Significant results were found for the duration of the international career experience in SA and the BM ($f = .55$; $p > 0.05$) and OM ($f = 1.33$; $p > 0.05$) as well as the overall career attitudes ($f = 2.92$; $p > 0.05$) of academics in the sample. Those academics in the 7-10 year duration of the international career experience in SA had the highest mean score (mean = 4.01) for the BM career attitude as well as for the OM career attitude (mean = 2.89). Overall, the mean scores for all durations of expatriation experience in SA reflected all career attitudes to some extent. Results indicate that gender, marital status, number of dependents,

location of expatriates family and field of study do not have significant influence over the career attitudes of respondents in the study.

9. To explore whether there is a relationship between expatriate academic's motivation to expatriate and their international career experience, their motivation to expatriate and career orientation and between their international career experience and career orientation at UKZN

Unfortunately, no significant results were found to verify the relationship between the expatriate academics motivation to relocate and their international career experience or their career orientation.

No significant results were found to verify the relationship between the expatriate academics motivation to relocate and their international career experience. Significant relationships were found for the component fulfillment of workplace expectations (Expatriation experience sub-scale) and organisational mobility preference (OM) ($r=.23$; $p<0.05$) (PBCA) and university community support (Expatriation experience sub-scale) and organisational mobility preference (OM) ($r=.28$; $p<0.05$) (PBCA)(Briscoe et al, 2006).

10.2.3 Aim 3: To examine the nature of the international career experience from the perspective of organisational stakeholders

10.2.3.1 Research objectives

10. To examine the challenges and opportunities associated with the management of expatriate academics as perceived by their academic line managers

11. To investigate the nature of the expatriation experience of expatriate academics from the perspective of HR specialists

Hiring expatriate academics has its benefits for higher education, including the fact that they are experts in their fields, that they have extensive international networks and that they are able to utilise their contacts to create collaborative research projects and innovative curricula. An extensive examination of the barriers faced by this group of expatriate academics at a macro-, meso and micro-level has been undertaken in the current study, which therefore adds to the body of knowledge regarding the challenges facing self-initiated SIEs.

Macro-level challenges in the form of administrative challenges such as immigration processes, dealing with the bureaucracy at Home Affairs, workplace legislation, verification of international qualifications and international benchmarking.

Meso-level challenges in the form of workplace adjustment such as language, access to research funds, lack of formal induction or orientation, teaching environment, compensation and benefits, incompetent HR administration, socio-cultural adjustment were experienced by expatriate academics at UKZN.

Finally, micro-level challenges in the form of family and lifestyle adjustment such as cultural assimilation, transport, schooling for children, safety and security, banking and finance and other family matters were experienced by expatriate academics at UKZN.

The fact that expatriate academics are captured on the personnel database at UKZN as ‘other’ to distinguish them from South Africans seems to encapsulate the ‘laissez faire’ management style that university policy makers have toward this group of highly skilled employees. They are not given any focused consideration and, other than the Relocation Policy, there does not seem to be any policy or process designed specifically to deal with this scarce human capital. This is in fact the case for any new employee who is relocating to the university, be it locally or internationally.

The next section presents recommendations to help improve the overall expatriation experience of expatriate academics.

10.3 Recommendations

Various recommendations will be made in this section. Firstly, recommendations to the national government will be made in order to improve the challenges faced by expatriates at macro-level (10.3.1). Next, recommendations on how to improve the expatriation experience at meso-level to university policy makers and those who implement policy will be presented (10.3.2).

10.3.1 Recommendations to the SA government and higher education policy makers

In South Africa, labour immigration is lagging behind. The CDE (1997), Oosthuizen (2014) and Mahlaka (2014) have criticised the restrictive nature of South Africa’s immigration

policy which has resulted in a reduction of inflows of immigrants into the country. Results of the study support these criticisms as this was labelled as one of the major challenges that both expatriate academics as well as the host institution have to deal with when engaging in an employment relationship. In order for South Africa to truly benefit from the migration of highly skilled individuals into the country, “its migration policies have to begin to mirror those of countries that have dominant immigrant economies like the USA, Canada, Australia and Singapore” (Rasool, 2010:399). These economies have employed immigrants and have achieved tremendous economic and cultural development. It is these countries that have become the magnets to highly skilled South African expatriates who have chosen to leave the country for various reasons.

Another major challenge faced by expatriate academics as well as those responsible for the recruitment of these scarce human resources is the bureaucracy at Home Affairs, which results in lengthy delays and frustration and has been a bone of contention for those trying to seek employment in South Africa. A thorough revamp of the processes at Home Affairs needs to be undertaken to ensure the smooth and efficient authorisation of immigrants’ work permits in a timeous manner. HR specialists have also suggested that corporate visas be issued to institutions that often hire immigrants in scarce skills categories so as to expedite the entire process. There is also the suggestion that there should be dedicated staff at Home Affairs to deal with universities and other institutions reliant on staff with scarce skills, as they require such services on an ongoing basis and there is a need to establish a good working relationship.

By subscribing to a regional SADC qualification framework, countries will enable the verification of foreign qualifications of individuals seeking employment in South Africa to take place more smoothly. Currently, the processes are too lengthy and cause great delays in appointments of new staff. As a result many of the disciplinary cases involving staff at UKZN result from inadvertent fraudulent or deliberate misrepresentations of qualifications.

Cultural diversity amongst all people who reside in South Africa should be celebrated as part of the society in which we live. Mistrust, fear of the unknown, alienation and isolation should be dispelled by SA government and other stakeholders in the business environment as well as social and religious leaders. The message should be of tolerance and unity to try to overcome the current situation of xenophobia and professional jealousy.

10.3.2 Recommendations to UKZN policy makers and organisational stakeholders

The management of SIEs by institutions in host countries needs to be reframed in terms of their contribution to the labour market in more positive and supportive ways. Howe-Walsh and Schyns (2010) postulate that ignoring SIEs and dealing with them on an ad-hoc basis will only lead to counterproductive and negative consequences, including downward career mobility and failure. According to Al Ariss and Ozbilgin (2010: 284), there is “a significant role that organisations can play in promoting equality, diversity and the inclusion of self-initiated employees to facilitate their unhindered contribution and integration into economic and social life”.

Richardson and McKenna (2003) suggest that more attention should be paid to equity and diversity as a way of internationalising higher education. There should be consideration of international work experience as criteria for promotion and hiring decisions. By using international work experience as a hiring criterion, higher education institutions can recruit international faculty, thereby supporting the need to internationalise and become truly global institutions of higher learning (Welch, 1997). This will bring diversity to our systems and processes. It will also enable “the internationalisation of curricula, research portfolios and teaching methods used in higher education today” (Regenesys Business School, 2013). Those academics with international work experience expect to be recognised and rewarded for it and universities can use such experience in course development, international research activities and increasing international networks.

Respondents in this study also point to concerns about the value of international experience for career development. Universities “employing international faculty might contribute towards allaying such concerns by providing opportunities for enhanced career development, such as supporting research agendas that will have currency in the broader academic marketplace” (Richardson, McKenna, Dickie, de Gama, 2013:65). Such a strategy may be especially useful in attracting international faculty as well as in retaining incumbents. Especially in the context of the study, where it was revealed that the majority of respondents are still on work permits after being in South Africa for seven to ten years, host institutions might seek to encourage a greater sense of stability. Naturally, however, the extent to which this is possible depends on the legal system in the host country. Host countries beyond South Africa as well would stand to benefit, given the increasing competition for faculty in the global marketplace. Richardson and McKenna (2003) also propose that compensation and

benefits packages should take into account the level of international work experience a candidate has and that they should be rewarded accordingly.

Results of the empirical study suggest that international standards of practice should be followed when it comes to the job descriptions of academic posts. This will ensure that the university attracts a high calibre of candidates when advertising posts, both internationally and nationally. Current practice and policy has led to recruiters being unable to fill senior posts that have remained vacant indefinitely because of the unrealistic expectations attached.

Respondents in the study indicated that they had a reasonably good idea of what to expect when settling down in KwaZulu-Natal, South Africa. This, however, was something that they researched on their own and was not part of any official programme. In order to address the deficiencies regarding organisational support, concerns about the ability of accompanying spouses to find appropriate employment, for example, might be addressed by providing a realistic living conditions preview (Templar, Tay and Chandrasekar, 2006), including information about local employment opportunities. It might even include providing support to spouses or partners in finding employment. A “realistic living conditions preview might also offer information about the social milieu of a particular position, such as the local expatriate community, social and sports amenities”(Richardson et al, 2008:490).

Similarly, the institution should establish support systems for newly arrived faculty, perhaps specifically for faculty arriving from outside the host country. Although it is a relatively common recommendation that institutions provide induction programs, the findings presented here indicate that there is no induction programme specifically designed for international staff. Understanding the reasons why expatriates choose to relocate and taking into account their individual circumstances could help HR to decide how best to support new employees so as to ensure successful adjustment and retention (Dickman et al, 2008).

Various authors like Richardson and Zikic (2007) and Howe-Walsh and Schyns (2010) suggest that some form of ongoing support is equally important. Empirical results also support these recommendations and suggest the creation of a mentorship or buddy programme by HR at the university to support the adjustment of new international staff members. University management should set up an international staff office similar to the International Student Office at the university. This will be the first port of call for the expatriate academic should there be any questions they may have; this center should be manned by dedicated staff who deal only with matters concerning expatriate academic staff.

The highly efficient and advanced Information Communication System (ICS) at UKZN should be put to good use by creating a link on the Staff page on UKZN's website dedicated to expatriate academics, which would cover all the information required to settle in South Africa and at the university itself. In order to become a truly international institution, the university needs to be able to attract expatriate academics from other regions. Compensation packages at the university need to be increased in order to match national standards so the university will be in a better position to compete with other leading research universities for scarce human talent. In addition, the provision of career development opportunities such as personal development programmes and access to research and teaching opportunities will greatly assist. Such measures will ensure that the learning experience of students is truly international. Acquiring experienced academics from other countries will ensure the benefit of true diversity. One of the recommendations in the literature (Ashmalla, 1998; Tung 1998; Tharenou and Caulfield, 2010:1009) is that "advanced technologies such as video conferencing, Skype, Instagram and Facebook could be used to overcome this challenge".

During the interview stage of the selection process, a mock presentation should be conducted to gauge the level of language proficiency of the candidate and the degree of influence the accent would have on the incumbent's ability to function in the new working environment. In addition, the introduction of English language proficiency training as part of an induction programme designed specifically to meet the demands of expatriate academics who do not speak English as their first or second language will greatly assist such academics to adjust more efficiently to their new environment. Perhaps the most valuable recommendation to expatriate academics is to keep an open mind when engaging with students and their new environments (work and living) so as to ensure that they are able to adjust more effectively and efficiently.

Using the recommendations presented in 10.4 as well as on the principles of talent management expounded on in the literature, the following model has been developed to improve the overall experience of expatriation at UKZN for both the academics themselves and organisational stakeholders.

10.4 A model for global talent management

The results of the study at UKZN have revealed that little to no special attention is given by HR to the special group of SIEs called expatriate academics, without whom many of the scarce skills disciplines at the university would shut down. In fact all HR policies and

practices are applied to expatriate academics in an ‘ad hoc’ manner, and are no different from to their local counterparts. Even though UKZN has an Integrated Talent management programme, it focuses on those individuals that can be classified as possessing ‘talent’, the so-called ‘high flyers’ in terms of research and teaching. Expatriate management is not part of this programme in a formal way, but the programme can be adjusted to include expatriates as from the evidence in this study, expatriate academics are highly talented individuals without whom many scarce skills disciplines would not be able to operate their teaching and learning programmes. Organisational stakeholders would also not be able to access the worldwide networks or collaborative research projects that expatriate academics provide access to by virtue of the fact that they have valuable international experience and social capital. As an outcome of this research, a model was created by the researcher by adopting the principles of talent management to effectively manage expatriate academics at UKZN.



Figure 10-1 Global talent management model

10.4.1 Phase 1: Workforce planning

As part of the strategic HR planning process, HR would perform a critical skills gap analysis. This would be where forecasts of short and medium term (1-5 years) retirements, secondments, sabbaticals, staff exchanges and so forth would take place. Succession planning would also come into effect to identify any potential local talent that could fill this gap – this could either be an existing junior member of staff or a Masters or doctoral or even post-doctoral student. If a gap is identified and the position is one that falls into the scarce skills category, then HR should immediately begin the Talent sourcing search. Empirical evidence has shown that there are some disciplines where it is next to impossible to source a local candidate.

10.4.2 Phase 2: Talent sourcing

During this phase, HR specialists, academic leaders and members of the school should use their contacts and networks in order to increase the talent pool that it is able to access to find the suitable candidate. Technology should be taken advantage of by using job posting boards, specialist professional websites such as those for engineers, academics, chemists, physicists and so forth, popular search engines such as Career 24, Career Junction. The UKZN staff vacancies page can also be used to advertise the vacancies together with university wide notices on the staff and student emails. Good old fashioned ‘word of mouth’ and referrals by other academics in the discipline are also useful points of departure when searching for a suitable candidate.

In order to attract potential candidates to the university there have to be factors that ‘pull’ them here. Currently, UKZN has an excellent reputation as a world class research university, and is ranked among the top five universities in the country. According to HR specialists, UKZN also has one of the best relocation policies in the country. So there has to be another reason why UKZN is still ranked third as an ‘employer of choice’ after WITS and UCT. This has been suggested as a direction for study in future. Thus the country of origin of expatriate academics needs to be taken into consideration during this phase, as this will allow HR specialists to identify the possible ‘push’ factors that may influence the decision to relocate as well as the ‘pull’ factors that could be beneficial in the negotiation process.

10.4.3 Phase 3: Selection

As part of the pre-departure phase, candidates should be exposed to realistic job and living previews. This will help to reduce the ‘culture shock’ of the candidate and their families once they arrive in SA. Candidates should be offered organisational support during this time, which includes furniture removal, travel arrangements for candidate and their families (flights etc.), sourcing of appropriate temporary housing, visa requirements (work permit) and immigration support, a contact person at the university and so on. Included here should be pre-assignment visits by the candidate and their spouse for a few days in order to meet academic leaders and colleagues and to make arrangements for settling in. Language proficiency analysis should be part of the pre-departure phase in order to establish the need to language training once the candidate arrives. During this phase, the candidate’s motives for relocation should be established, in order to determine the kind of tailor-made support the university can offer the candidate and their family once they arrive to take up the post. The assessment of the expatriate academic’s career attitudes should be also be done here in order to determine the kind of support the organization could offer the candidate.

10.4.4 Phase 4: Onboarding

This phase of the process entails much more than a traditional induction programme as suggested by organisational stakeholders. To date there is no specific on-boarding programme for expatriate academics at the university. The purpose of a proper on-boarding programme is to facilitate the efficient and effective adjustment of the expatriate to their new work and living environment. UKZN can offer the candidate language training to help them understand South African English colloquialisms in order to better communicate with local colleagues and students. Cultural diversity training focusing on the rich heritage of diversity amongst South Africans can take place during this phase as well, so as to educate expatriates about the traditions, customs, social and professional etiquette that will avoid any unnecessary misunderstandings. Information about safe and unsafe practices in South African society will also have to be provided, so that expatriates are aware of safety and security issues in Durban and Pietermaritzburg. HR specialists should be able to identify the motivation for relocation and the kind of prior knowledge candidates have of UKZN and life in Durban and Pietermaritzburg in general in order to best cater to the information needs of the candidate.

Supervisor support is also critical in the successful adjustment of the expatriate to their new work environment therefore it is important that the academic leaders have to undergo mentorship skills training in order to prepare them for their supporting roles. It is also imperative that a peer mentor be appointed from the school (discipline) in order to facilitate the smooth integration of the expatriate into the school ethos. This staff member will also have to undergo specific skills training of how to be a peer mentor.

An International Staff office needs to be created that is similar to the International student office at UKZN, and needs to be manned by specialist HR staff who have been specifically trained to handle all administrative matters concerning the successful integration of the expatriate into the university community, such as the opening up of bank accounts, medical aid, Unemployment fund (UIF) registration, etc. There also needs to be a liaison between the university and Home Affairs who is responsible for communications between the staff member and Home Affairs to deal with any and all issues with work permits. A representative from the Research Office will need to be part of the staff at the International Staff office in order to provide assistance to the expatriate in terms of opportunities for research funding, IRMA inputs, creating research accounts etc.

It is recommended that UKZN creates a social club (sport and recreation) for staff members (both local and expatriate) to interact with one another on a social level. This will help overcome feelings of isolation and homesickness that expatriates experience as part of the ‘culture shock’ when expatriates arrive here. The creation of a start-up fund for the new expatriate academic can assist them in getting started in terms of their research as well as allow them to make home visits in the first year of employment so as to maintain the strong ties with family and friends back home as facilitate a smooth adjustment into their new environment. As part of the Heritage Day celebrations on the 24 of September where South Africa’s own cultural diversity is celebrated, UKZN should include the celebration of other cultures as part of the celebrations. Opportunities should be taken by the Corporate Relations Department of the university to celebrate cultural diversity in the workplace amongst staff and students, by recognising each other’s national, cultural and religious holidays.

10.4.5 Phase 5: Training and development

UKZN as an institution of higher learning has access to a number of personal and professional development programmes that new staff members can access. Language

training and cultural awareness training are just some of the personal development programmes run by the university. Mentorship skills training for peers and supervisors are also offered as part of the university's Extended Learning programme. An induction and orientation programme is also offered to all new appointees, but this programme is run biannually, this could be run every semester. Also it is mandatory for all staff members holding the post of lecturer and below to participate in the UEIP (University Education Induction Programme) to further professional and personal growth. The academic line manager, expatriate academic, and their peer mentor can decide which of the training programmes the expatriate academic would need to attend in order to facilitate their smooth adjustment to the university environment.

In order to become an 'employer of choice' UKZN needs to position itself as an employer interested in the personal and professional development of its staff members. Expatriate academics as a source of scarce skills need special attention in order to be made to feel welcome; this is also linked to their career orientation as protean actors, and therefore proper organisational support is necessary in order to retain this valuable resource.

10.4.6 Phase 6: Performance management

In today's competitive business environment, competitive advantage can be gained through one's employees. One of the most valuable assets an employee has today is their international experience. This should be no different in a university setting. The social capital an expatriate academic brings to the university should be rewarded through the performance management system at UKZN. International collaborations on research projects, presenting papers at international conferences, sustaining international partnerships, participating in staff exchange programmes etc. should be part of the professional development UKZN encourages. Therefore the social capital that the expatriate academic brings to the university should be acknowledged as part of their performance management agreement and as such be rewarded through special compensation and or benefits.

UKZN can become the 'employer of choice' for expatriate academics in SA, by creating a customised organisational support programme, such as the one suggested by the model above, to tailor the successful international career experience of expatriate academics at the university to ensure that these valuable human resources remain at the university. Also

performance management can be used as a vehicle for regular, meaningful two-way communication between the expatriate and his or her line manager. During these discussions, the focus can be on what has been done and looking to the future, what plans can be put into place to sustain and deepen the 'person-organisation fit'.

10.5 Original contribution of the study

This study is a multi-disciplinary study that is situated in a number of disciplines such as expatriate management, career management, migration as well as higher education studies. Therefore it adds to the existing body of knowledge by providing a multi-disciplinary approach to a concept that was previously exclusively dealt with in management studies in a business environment. Previous research on expatriates has examined their experiences from an organisational perspective, in other words the measures the organisation can take to ensure the success and prevent the failure of an international assignment. This study is therefore unique as it highlights the perceptions of organisational support by expatriate academics to assess whether or not the organisation, in this case UKZN is doing enough to ensure the success of the international experience of expatriate academics. The aim of this study is to create a programme whereby the challenges that expatriate academics face in SA and UKZN in particular can be addressed and resolved in order to ensure the success and inevitable retention of these highly talented individuals who are currently servicing the scarce skills disciplines at the university.

By adopting a mixed methodology research design, the study at the host institution UKZN examines the international career experience of expatriate academics from both the perspective of the individuals themselves as well as the organisational stakeholders responsible for them, thereby making a unique contribution to the existing body of knowledge on SIEs. This original research aims to add to existing scholarship on SIEs by examining a different sample of respondents; traditionally studies on SIEs have focused on Western and European samples. This study focuses on, firstly, a unique context that is SA and, secondly, by engaging with mainly African respondents further characteristics of SIEs can be highlighted from an ethnic and cultural perspective. This study has also adopted a model from migration studies to examine the international career experience of expatriate academics in SA from a macro-, meso- and micro-level of analysis. A further aim of the study was to examine the motives and career attitudes of expatriate academics as SIE's

further contributes to the scholarship on SIEs, a field of management studies that currently has a paucity of empirical work.

By examining the academic mobility patterns of expatriate academics into SA higher education institutions this study contributes to the dearth of studies focusing on this phenomenon of SA's 'brain gain', that is, the inflow of highly qualified and skilled individuals into SA, whereas previous research has mainly focused on the reasons why SA citizens expatriate, this study examines why highly talented individuals expatriate to SA. It further adds to the body of knowledge on the migration patterns of the highly skilled by focusing on all levels of academia not only on those in management or leadership positions.

This study contributes to the existing body of knowledge of career attitudes in career management. By using the PBCA (Briscoe et al, 2006) in a different organisational setting and applying it to expatriate academics who are SIEs, the study serves to further validate the instrument in SA. It also serves to add to the existing body of knowledge on career management by analysing the kind of organisational support programmes best suited to this unique group of individuals.

10.6 Limitations of the study

This study is exploratory and involves a single professional group in a single organisation in South Africa. Some of the challenges and opportunities presented here are unique to the academic setting such as teaching and research, and this cannot be applied to other organisational settings. Furthermore, the quantitative study was part of a larger mixed methods research design; 83 respondents do not make this a large scale survey, and therefore this could also be a limitation. As part of the mixed methods design, phase one of this study, namely secondary data collection, was limited in its relevance due to the time lag of one year in the availability of current data on staff numbers. Phase three of the study, the qualitative phase of the research was conducted with line managers of those schools that had three or more expatriate academics working there. This could have been a limitation in that these line managers could have been newly appointed, the academics themselves may have been newly appointed to the school therefore their kinds of responses received during the interviews may have been brief and superficial. In terms of the interviews with the HR specialists, because of

the lack of transparency regarding the race/ethnicity of the candidates this often made it difficult for specialists provide in-depth, culturally relevant data to the researcher.

Also, the fact that the sample used was predominately from African countries, male and between the ages of 40-59 years old and from the College of Science, Agriculture and Engineering, at UKZN in Kwazulu-Natal, Durban, South Africa could limit the study's generalisability. This calls for caution in generalising these findings to other groups in other contexts. The results of this study seem to indicate that ethnicity/culture have played a role in the study; this was not fully explored due to the fact that this demographic was not collected from the data available from HEMIS and DMI (UKZN) as foreign or expatriate staff were classified as "Other" or "NON-SA", or in terms of nationality.

While the study has identified the challenges faced by expatriate academics, this was done from a management perspective. Due to financial and time constraints the study was unable to engage in longitudinal research into the expatriate experience of academics at the UKZN from an individual perspective.

Academics at UKZN are notoriously apathetic to participating in research conducted at the university, in fact many studies, have very poor response rates. Anecdotal evidence points to such low response rates as 20-30% due to this problem. This presented a major challenge to securing the desired number of responses to the questionnaire. Thus the researcher deliberately chose to apply snowballing sampling as respondents often knew each other personally and professionally; however, this brought in a certain degree of bias to the results as respondents may well have shared thoughts and opinions on matters covered by the study.

When academics that fit the sample were approached to participate in this study, they were initially apprehensive at being identified as expatriate academics, and secondly would often not want to participate, unless the researcher would indicate the call was a referral from a known expatriate colleague. Often, the researcher would have to ask the previous respondent to inform the intended respondent about the study, so that access would be granted. The possible reasons for this have been described in previous chapters.

Due to challenges uncovered during Phase 3 of the study, that is, problems with English language proficiency, some academics may have had difficulties understanding the terminology used in the questionnaire. Despite the researcher offering assistance, this may have distorted their responses to questions.

10.7 Directions for future research

The study has attempted to create knowledge in an area not previously researched in South Africa. Therefore the findings here will be useful to other researchers in order to indicate what areas to focus on, such as patterns of inflows of the highly skilled, motivations of those that immigrate to South Africa, their expatriation experience and how their career attitudes help shape their experiences.

As this was one of the first attempts to measure the structural characteristics of a PBCA (Briscoe et al. 2006) in a university setting in SA, the results revealed that clearly these academics have a highly protean career orientation while exhibiting a low boundaryless career attitude. The career experiences of expatriate academics clearly deviated from the traditional career principles of academic careers. Clearly, respondents were more focused in subjective aspects of career success than objective measures, such as promotions, better salaries and benefits and so forth, but rather focused on career building and developing their social capital. Using the PBCA (Briscoe et al. 2006) in other organisational settings as well as with other groups of SIEs will assist in further validating this instrument.

Future studies can verify the challenges and opportunities presented by the international career experience at UKZN by directly engaging expatriate academics themselves in in-depth interviews. However, in future this style of research could greatly assist policy makers and those who implement policy to make the necessary changes in current practice to improve the overall expatriation experience, thereby allowing both UKZN and the individual to make the best of the employment relationship.

Further research is required to explore the challenges, other groups of SIEs face when undertaking international career mobility, particularly in SA. The study also gives direction to those responsible for the management of these highly skilled individuals and assists them to understand how to best support their precious human capital by developing appropriate career and personal development programmes aimed specifically at the needs of this particular group without whom many programmes would not be able to function. Therefore, further research is required to explore the manner in which management can best support and harness the skills and aptitudes of SIEs, who now form a large part of the internationally mobile workforce. Future research could focus on the management practices of organisations employing traditional expatriates and those employing SIEs and create a best practice model for retaining this human talent.

Future studies can examine the privately-funded universities and colleges as well as Further Education and Training Colleges (FET) in SA to explore the experiences of expatriate academics in these unique settings. Future studies can also investigate particular groups of expatriate academics based on perhaps gender, ethnicity/culture, field of study (academic discipline), career stage and life stage to explore their experiences of expatriation as well as their motivations for expatriating.

This study could serve as the foundation upon which to base future studies of the experiences of expatriate academics at public institutions of higher learning across South Africa. It could also serve as the foundation for future studies of the experiences and motivations to expatriate of expatriate academics in other African countries. In future, comparative studies could be undertaken examining the experiences of expatriate academics as well as the HR policies and practices that have focused exclusively on expatriate academics at UCT and WITS as these two universities have been the ‘employers of choice’ over the last eight years in SA.

10.8 Chapter summary

This chapter has served to provide the concluding remarks of the thesis in terms of the research aims and objectives of this study. It has also provided recommendations to the South African government and Higher education policy makers in terms of dealing with macro-level challenges that expatriate academics currently face in SA. It went on further to make recommendations to UKZN policy makers and organisational stakeholders, and provides a model of best practice for managing expatriate academics in a more formal and comprehensive manner. The chapter then reiterated the original contribution made by this study to the body of scholarship, described in Chapter 1. Furthermore, the limitations and directions for future research were provided.

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APPENDIX A: GATE KEEPERS LETTER



6 June 2011

Ms A Maharaj
Lecturer
School of Management Studies
Westville Campus

UKZN

Dear Ms Maharaj,

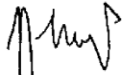
RE: PERMISSION TO CONDUCT RESEARCH

Gatekeeper's permission is hereby granted for you to conduct research at the University of KwaZulu-Natal in the following project, provided Ethical clearance has been obtained via the Research Office:

- 1) Academic Expatriates and Expatriate Management within South African Higher Education Institutions – the Case of UKZN

Please note that the data collected must be treated with confidentiality and anonymity.

Yours sincerely,



Prof J. Meyerowitz
Registrar

Office of the Registrar
Postal Address: Private Bag X54001, Durban 4000, South Africa
Telephone: +27 (0) 31 260 8005/2206 Facsimile: +27 (0) 31 260 7824/2204 Email: registrar@ukzn.ac.za
Website: www.ukzn.ac.za

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APPENDIX B: ETHICAL CLEARANCE LETTER



21 November 2014

Ms Ashika Maharaj (921304622)
School of Management, IT & Governance
Westville Campus

Dear Ms Maharaj,

Protocol reference number: HSS/0772/011D

Project title: Expatriate Academics and Expatriate Management in a South African Higher Education Institution

Approval Notification – Amendment

This letter serves to notify you that your application and request for an amendment received on 25 September 2014 has now been approved as follows:

- * Addition of supervisor

Any alterations to the approved research protocol i.e. Questionnaire/Interview Schedule, Informed Consent Form; Title of the Project, Location of the Study must be reviewed and approved through an amendment /modification prior to its implementation. In case you have further queries, please quote the above reference number.

PLEASE NOTE: Research data should be securely stored in the discipline/department for a period of 5 years.

The ethical clearance certificate is only valid for period of 3 years from the date of issue. Thereafter Recertification must be applied for on an annual basis.

Best wishes for the successful completion of your research protocol.

Yours faithfully



Dr Shenyika Singh (Chair)

APPENDIX C: ORIGINAL QUESTIONNAIRE

THE CAREER EXPERIENCES OF EXPATRIATE ACADEMICS AT UKZN

SECTION A: DEMOGRAPHIC DATA

- **Instructions to Participants**

Please indicate your response by ticking the appropriate block.

1. AGE

20-25	26-30	31-35	36-40	41-50	50+
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

1 2 3 4 5 6

2. GENDER

MALE	FEMALE
<input type="checkbox"/>	<input type="checkbox"/>

1 2

3. MARITAL STATUS

SINGLE	MARRIED	DIVORCED	WIDOWED	OTHER
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

1 2 3 4 5

4. NUMBER OF CHILDREN (Please indicate how many children you have)

0	1	2	3	4+
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

1 2 3 4 5

5. AGE OF CHILDREN (Please indicate the number of children per age group)

< 5	5-10	11-15	16+
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

1 2 3 4

6. IS YOUR FAMILY HERE WITH YOU?

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>

1 2

SECTION B: THE EXPATRIATION EXPERIENCE (EXPATRIATE ACADEMICS)

1. Pre-Departure Phase:

1.1 The Opportunity to Expatriate

- Instructions to Participants

Below are a number of statements that might be useful to describe how the opportunity for you to expatriate to South Africa arose. Please indicate the level of applicability you associate with each of the following statements related to the opportunity for you to expatriate.

	Completely Applicable	Slightly Applicable	Moderately Applicable	Quite Applicable	Exceedingly Applicable
Historical	1. Family connections in South Africa				
	1	2	3	4	5
Serendipity	2. Studied here during the undergraduate/postgrad phase				
	1	2	3	4	5
	3. Have worked in South Africa previously				
	1	2	3	4	5
	4. Have worked in other countries previously				
	1	2	3	4	5
	5. Chance (Opportunity, option, possibility)				
	1	2	3	4	5
	6. Luck (fate, destiny, good fortune)				
	1	2	3	4	5
7. Coincidence (fluke, accidental, happenstance)					
1	2	3	4	5	

	Completely Applicable	Slightly Applicable	Moderately Applicable	Quite Applicable	Exceedingly Applicable
Planned Action	8. Economic Necessity (the economic situation in own country is unstable)				
	1	2	3	4	5
	9. Political Turmoil (own country is experiencing political turmoil and violence)				
	1	2	3	4	5
	10. Opportunity for promotion				
	1	2	3	4	5
	11. Better benefits				
1	2	3	4	5	
12. Other reasons that you may find applicable to you that are not listed above					

1.1 The Decision to Expatriate:

- Instructions to Participants

Below are a number of factors that might be used to describe what influenced your decision to expatriate to South Africa. Please indicate the level of influence you attach to each factor.

	No Influence	Little Influence	Moderate Influence	Significant Influence	Highly Significant Influence
Adventure/Travel	13.Challenge to self				
	1	2	3	4	5
	14.Opportunity to see new places, meet new people, experience different cultures				
	1	2	3	4	5
Life Change	15.Boredom with old routine				
	1	2	3	4	5
	16.Dealing with personal problems				
	1	2	3	4	5
Financial	17.Reinventing one's self				
	1	2	3	4	5
	18.Better salary				
	1	2	3	4	5
Career	19.Better benefits				
	1	2	3	4	5
	20.Career Advancement				
	1	2	3	4	5
Family	21.Pursuit of meaningful and challenging work				
	1	2	3	4	5
	22.Overcome Career plateauing/stagnation				
	1	2	3	4	5
Family	23.Aging and elderly parents				
	1	2	3	4	5
	24.Extended family				
	1	2	3	4	5
	25.Spouse/partner presented with job opportunity in SA				
	1	2	3	4	5
	26.Better education for children				
	1	2	3	4	5
Personal Transformation	27.Concerns for safety and security of children				
	1	2	3	4	5
	28.Quality of life				
	1	2	3	4	5
	29.Self discovery				
	1	2	3	4	5
	30.Personal Growth				
	1	2	3	4	5
Other	31.Searching for one's life purpose				
	1	2	3	4	5
	32.Acquisition of new knowledge				
	1	2	3	4	5
Other	33.Please indicate your own reason should it not appear on the list above				

--	--

1.2 Perception of Pre-Departure Phase Experience

- Instructions to Participants

Below are a number of statements that describe your perceptions of the pre-departure phase of your expatriation experience. Please indicate your level of agreement or disagreement with each statement.

Agree Strongly	Agree	Agree slightly	No opinion	Disagree slightly	Disagree	Disagree strongly
34. My spouse/partner and children played an important role in my decision to expatriate.						
7	6	5	4	3	2	1
35. The university offered my family and I a high level of support during the pre-departure phase						
7	6	5	4	3	2	1
36. My expectations of my work situation were based on realistic job previews						
7	6	5	4	3	2	1
37. My expectations of my living conditions were based on realistic living previews.						
7	6	5	4	3	2	1

2. 2. The Actual Expatriation Experience

Agree Strongly	Agree	Agree Slightly	No Opinion	Disagree Slightly	Disagree	Strongly Disagree
38. My expectations regarding your work situation have not been met.						
7	6	5	4	3	2	1
39. My expectations have been met.						
7	6	5	4	3	2	1
40. My expectations regarding your work situation have been exceeded.						
7	6	5	4	3	2	1
41. My spouse/and children have played an important role in my overall experience of expatriation						
7	6	5	4	3	2	1
42. My family and friends in my home country were supportive of my decision to expatriate to South Africa.						
7	6	5	4	3	2	1
43. My family and I maintain close ties with family and friends back home.						
7	6	5	4	3	2	1
44. My colleagues at my old institution in my previous country were supportive of my decision to expatriate to South Africa.						
7	6	5	4	3	2	1
45. My school is a collegial place to work.						

7	6	5	4	3	2	1
46. The community where I now live is supportive of my family.						
7	6	5	4	3	2	1
47. Other expatriates in the university community have expressed interests in networking with me.						
7	6	5	4	3	2	1
48. Other expatriates in the community where I live have expressed an interest in establishing contact with me.						
7	6	5	4	3	2	1
49. On taking up my new position, the university offered support to my family for eg. accommodation, finding schools for the children, helping the spouse get employment etc.						
7	6	5	4	3	2	1
50. My school has helped me with the challenges I have faced in my teaching.						
7	6	5	4	3	2	1
51. My school has helped me in pursuing my research activities.						
7	6	5	4	3	2	1
52. My school does not provide me with enough resources to participate in professional development activities (e.g travel to conferences, attend developmental workshops)						
7	6	5	4	3	2	1
53. I value being a member of this school.						
7	6	5	4	3	2	1
54. I have received excellent collegial support in this school.						
7	6	5	4	3	2	1
55. Working in this school is intellectually stimulating.						
7	6	5	4	3	2	1
56. South Africa compares favourably in terms of the cost of living to my home country.						
7	6	5	4	3	2	1
57. South Africa compares favourably in terms of living standards to my home country.						
7	6	5	4	3	2	1
58. Working at this university will have a positive impact on my career.						
7	6	5	4	3	2	1

59. List the three most challenging aspects you have experienced as an expatriate academic.

60. List the three most rewarding aspects of your experience as an expatriate academic.

Section C: The “Protean and Boundaryless” Career Attitude Scale (PBCA)

Developed by Briscoe and Hall (2006:16) has been adapted for the purposes of this study.

- Instructions to Participants

Below are a number of statements that describe your attitude towards your career. Please indicate the extent to which these statements have influenced your career attitude:

To little or no extent	To a limited extent	To some extent	To a considerable extent	To a great extent
1	2	3	4	5

Item	1	2	3	4	5
1. When development opportunities have not been offered by my university, I've sought them out on my own	1	2	3	4	5
2. I am responsible for my success or failure in my career	1	2	3	4	5
3. Overall, I have a very independent, self-directed career	1	2	3	4	5
4. Freedom to choose my own career path is one of my most important values	1	2	3	4	5
5. I am in charge of my own career	1	2	3	4	5
6. Ultimately, I depend on myself to move my career forward	1	2	3	4	5
7. Where my career is concerned, I am very much “my own person”	1	2	3	4	5
8. In the past I have relied more on myself than on others to find a new job when necessary	1	2	3	4	5
9. I navigate my own career, based on my personal priorities, as opposed to my employer’s priorities	1	2	3	4	5
10. It doesn’t matter much to me how other people evaluate the choices I make in my career	1	2	3	4	5

11. What's most important to me is how I feel about my career success, not how other people feel about it	1	2	3	4	5
12. I'll follow my own conscience if my school asks me to do something that goes against my values	1	2	3	4	5
13. What I think about what's right in my career is more important to me than what my university thinks	1	2	3	4	5
14. In the past I have sided with my own values when the university has asked me to do something I don't agree with	1	2	3	4	5
15. I seek projects that allow me to learn something new	1	2	3	4	5
16. I would enjoy working on projects with people across many institutions	1	2	3	4	5
17. I enjoy research projects that require me to work outside of the university	1	2	3	4	5
18. I like tasks at work that require me to work beyond my own school	1	2	3	4	5
19. I enjoy working with people outside of my university	1	2	3	4	5
20. I enjoy jobs that require me to interact with people in many different institutions	1	2	3	4	5
21. I have sought opportunities in the past that allow me to work outside the university	1	2	3	4	5
22. I am energized in new experiences and situations	1	2	3	4	5
23. I like the predictability that comes with working continuously for the same university	1	2	3	4	5
24. I would feel lost if I couldn't work for my current university	1	2	3	4	5
25. I prefer to stay in a university I am familiar with rather than look for employment elsewhere	1	2	3	4	5

26. If my university offered lifetime employment, I would never desire to seek work in other universities	1	2	3	4	5
27. In my ideal career I would only work for one university	1	2	3	4	5

Thank you very much for taking the time to complete this questionnaire.

APPENDIX D: RELIABILITY FINDINGS OF SECTIONS REMOVED FROM QUESTIONNAIRE

Frequency distribution for the Opportunity to Expatriate sub-scale

	2 (Completely/Slightly applicable)		3 (Moderately applicable)		4 (Quite/Not applicable)	
	Count	Table N %	Count	Table N %	Count	Table N %
OneB	7	12.7%	5	9.1%	43	78.2%
TwoB	18	32.7%	3	5.5%	34	61.8%
ThreeB	8	14.5%	3	5.5%	44	80.0%
FourB	25	45.5%	2	3.6%	28	50.9%
FiveB	27	49.1%	11	20.0%	17	30.9%
SixB	7	12.7%	9	16.4%	39	70.9%
SevenB	7	12.7%	8	14.5%	40	72.7%
EightB	8	14.5%	8	14.5%	39	70.9%
NineB	9	16.4%	3	5.5%	43	78.2%
TenB	15	27.3%	15	27.3%	25	45.5%
ElevenB	18	32.7%	13	23.6%	24	43.6%

Reliability – All scale questions in 1.1

Reliability Statistics	
Cronbach's Alpha	N of Items
.262	11

Item-Total Statistics				
	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Cronbach's Alpha if Item Deleted
OneB	33.47	9.180	-.035	.292
TwoB	33.84	7.176	.292	.123
ThreeB	33.47	8.661	.078	.248
FourB	34.07	9.476	-.153	.375
FiveB	34.31	8.477	.051	.262
SixB	33.55	8.586	.102	.238
SevenB	33.53	8.698	.076	.249
EightB	33.56	7.473	.371	.113
NineB	33.51	8.180	.177	.203
TenB	33.95	8.201	.127	.224
ElevenB	34.02	8.833	-.015	.295

Reliability – Historical

Reliability Statistics	
Cronbach's Alpha	N of Items
.312	4

Item-Total Statistics				
	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Cronbach's Alpha if Item Deleted
OneB	10.00	3.000	.107	.309

TwoB	10.36	2.199	.243	.139
ThreeB	10.00	2.444	.343	.061
FourB	10.60	2.726	.014	.458

Reliability - Serendipity

Reliability Statistics	
Cronbach's Alpha	N of Items
.249	3

Item-Total Statistics				
	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Cronbach's Alpha if Item Deleted
FiveB	7.18	1.226	.072	.351
SixB	6.42	1.470	.099	.252
SevenB	6.40	1.244	.253	-.070 ^a

a. The value is negative due to a negative average covariance among items. This violates reliability model assumptions. You may want to check item codings.

Reliability – Planned Action

Reliability Statistics	
Cronbach's Alpha	N of Items
.521	4

Item-Total Statistics				
	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Cronbach's Alpha if Item Deleted
EightB	9.91	2.751	.390	.384
NineB	9.85	3.164	.192	.542
TenB	10.29	2.729	.295	.463
ElevenB	10.36	2.458	.376	.385

APPENDIX E: INFORMED CONSENT FORM: QUESTIONNAIRE

University of KwaZulu-Natal

School of Management, Pietermaritzburg

Informed Consent Document

I, Ashika Maharaj, am currently registered for studies leading to the Doctorate of Philosophy (PhD). One of the requirements to be met for the awarding of the Doctorate of Philosophy (PhD) is that I should undertake an approved research project leading to the submission of a dissertation. The approved topic which I have chosen is:

“Expatriate Academics and Expatriate Management at a South African Higher Education Institution”.

Please note that this investigation is being conducted in my personal capacity. Should you need to contact me regarding any aspect of this research, you can do so either by e-mail on : maharajash@ukzn.ac.za or telephonically on : 031-2608182 or 084 999 1938.

My academic supervisor is Dr.K.Ortlepp, based in the School of Management on the Pietermaritzburg campus of the University of KwaZulu-Natal. She can be contacted by e-mail at : ortleppk@ukzn.ac.za or telephonically at : 033-2606168.

Information gathered in this study will include data retrieved from the questionnaire that I request you to complete. Please note that only summary data will be included in the report and that your name will not be included. Your anonymity and confidentiality is of utmost importance and will be maintained throughout the study.

Your participation in completing the questionnaire is completely voluntary. You also have the right to withdraw at any time during the study.

I appreciate the time and effort it will take you to participate in this study. I would highly appreciate your participation, as it would help me to complete this research project.

This page can be retained by the respondent

Please turn over

This page must accompany the returned questionnaire.

Please complete the section below:

I (Full names of participant) hereby confirm that I understand the contents of this document and the nature of the research project, and I consent to participating in the research project.

I understand that I am at liberty to withdraw from the project at any time, should I so desire.

Signature of Participant.....

Date.....

APPENDIX F: AMENDED FINAL QUESTIONNAIRE

THE CAREER EXPERIENCES OF EXPATRIATE ACADEMICS AT UKZN

SECTION A: DEMOGRAPHIC DATA

- **Instructions to Participants**

Please indicate your response by ticking the appropriate block.

2. AGE

20-25	26-30	31-35	36-40	41-50	50+
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1	2	3	4	5	6

2. GENDER

MALE	FEMALE
<input type="checkbox"/>	<input type="checkbox"/>
1	2

3. MARITAL STATUS

SINGLE	MARRIED
<input type="checkbox"/>	<input type="checkbox"/>
1	2

4. NUMBER OF CHILDREN (Please indicate how many children you have)

0	1	2	3	4+
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1	2	3	4	5

5. AGE OF CHILDREN (Please indicate the number of children per age group)

< 5	5-10	11-15	16+
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1	2	3	4

6. IS YOUR FAMILY HERE WITH YOU?

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>
1	2

SECTION B: THE EXPATRIATION EXPERIENCE (EXPATRIATE ACADEMICS)

1. Pre-Departure Phase:

1.2 The Decision to Expatriate:

- Instructions to Participants

Below are a number of factors that might be used to describe what influenced your decision to expatriate to South Africa. Please indicate the level of influence you attach to each factor.

	No Influence	Little Influence	Moderate Influence	Significant Influence	Highly Significant Influence
Adventure/Travel	13.Challenge to self				
	1	2	3	4	5
	14.Opportunity to see new places, meet new people, experience different cultures				
Life Change	1	2	3	4	5
	15.Boredom with old routine				
	1	2	3	4	5
	16.Dealing with personal problems				
Financial	17.Reinventing one's self				
	1	2	3	4	5
	18.Better salary				
Career	1	2	3	4	5
	19.Better benefits				
	1	2	3	4	5
Family	20.Career Advancement				
	1	2	3	4	5
	21.Pursuit of meaningful and challenging work				
	1	2	3	4	5
	22.Overcome Career plateauing/stagnation				
	1	2	3	4	5
	23. Aging and elderly parents				
	1	2	3	4	5
	24.Extended family				
	1	2	3	4	5
	25.Spouse/partner presented with job opportunity in SA				
	1	2	3	4	5
	26.Better education for children				
	1	2	3	4	5
27.Concerns for safety and security of children					
1	2	3	4	5	
28.Quality of life					
1	2	3	4	5	

Personal Transformation	29. Self discovery				
	1	2	3	4	5
	30. Personal Growth				
	1	2	3	4	5
	31. Searching for one's life purpose				
	1	2	3	4	5
32. Acquisition of new knowledge					
1	2	3	4	5	

1.3 Perception of Pre-Departure Phase Experience

- Instructions to Participants

Below are a number of statements that describe your perceptions of the pre-departure phase of your expatriation experience. Please indicate your level of agreement or disagreement with each statement.

Agree Strongly	Agree	Agree slightly	No opinion	Disagree slightly	Disagree	Disagree strongly
34. My spouse/partner and children played an important role in my decision to expatriate						
7	6	5	4	3	2	1
35. The university offered my family and I a high level of support during the pre-departure phase						
7	6	5	4	3	2	1
36. My expectations of my work situation were based on realistic job previews						
7	6	5	4	3	2	1
37. My expectations of my living conditions were based on realistic living previews.						
7	6	5	4	3	2	1

2. The Actual Expatriation Experience

Agree Strongly	Agree	Agree Slightly	No Opinion	Disagree Slightly	Disagree	Strongly Disagree
38. My expectations regarding my work situation have not been met.						
7	6	5	4	3	2	1
39. My expectations have been met.						
7	6	5	4	3	2	1
40. My expectations regarding my work situation have been exceeded.						
7	6	5	4	3	2	1
41. My spouse and children have played an important role in my overall experience of expatriation						
7	6	5	4	3	2	1
42. My family and friends in my home country were supportive of my decision to expatriate to South Africa.						

7	6	5	4	3	2	1
43. My family and I maintain close ties with family and friends back home.						
7	6	5	4	3	2	1
44. My colleagues at my old institution in my previous country were supportive of my decision to expatriate to South Africa.						
7	6	5	4	3	2	1
45. My school is a collegial place to work.						
7	6	5	4	3	2	1
46. The community where I now live is supportive of my family.						
7	6	5	4	3	2	1
47. Other expatriates in the university community have expressed interests in networking with me.						
7	6	5	4	3	2	1
48. Other expatriates in the community where I live have expressed an interest in establishing contact with me.						
7	6	5	4	3	2	1
49. On taking up my new position, the university offered support to my family for eg. Accommodation, finding schools for the children, helping the spouse get employment etc.						
7	6	5	4	3	2	1
50. My school has helped me with the challenges I have faced in my teaching.						
7	6	5	4	3	2	1
51. My school has helped me in pursuing my research activities.						
7	6	5	4	3	2	1
52. My school does not provide me with enough resources to participate in professional development activities (eg. Travel to conferences, attend workshops etc)						
7	6	5	4	3	2	1
53. I value being a member of this school.						
7	6	5	4	3	2	1
54. I have received excellent collegial support in this school.						
7	6	5	4	3	2	1
55. Working in this school is intellectually stimulating.						
7	6	5	4	3	2	1
56. South Africa compares favourably in terms of the cost of living to my home country.						
7	6	5	4	3	2	1
57. South Africa compares favourably in terms of living standards to my home country.						
7	6	5	4	3	2	1
58. Working at this university will have a positive impact on my career.						
7	6	5	4	3	2	1

SECTION C: THE “PROTEAN AND BOUNDARYLESS” CAREER ATTITUDE SCALE (PBCA)

Developed by Briscoe and Hall (2006:16) has been adapted for the purposes of this study.

- Instructions to Participants

Below are a number of statements that describe your attitude towards your career. Please indicate the extent to which these statements have influenced your career attitude:

To little or no extent	To a limited extent	To some extent	To a considerable extent	To a great extent
1	2	3	4	5

Item

1. When the development opportunities have not been offered by my university, I have sought them out myself.	1	2	3	4	5
2. I am responsible for my success or failure in my career	1	2	3	4	5
3. Overall, I have a very independent, self-directed career	1	2	3	4	5
4. Freedom to choose my own career path is one of my most important values	1	2	3	4	5
5. I am in charge of my own career	1	2	3	4	5
6. Ultimately, I depend on myself to move my career forward	1	2	3	4	5
7. Where my career is concerned, I am very much “my own person”	1	2	3	4	5
8. in the past I have relied more on myself than on others to find a new job when necessary	1	2	3	4	5
9. I navigate my own career, based on my personal priorities, as opposed to my employer’s priorities	1	2	3	4	5
10. It doesn’t matter much to me how other people evaluate the choices I make in my career	1	2	3	4	5
11. What’s most important to me is how I feel about my career success, not how other people feel about it	1	2	3	4	5
12. I’ll follow my own conscience if my school asks me to do something that goes against my values	1	2	3	4	5
13. What I think about what’s right in my career is more important to me than what	1	2	3	4	5

my university thinks					
14. In the past I have sided with my own values when the university has asked me to do something I don't agree with	1	2	3	4	5
15. I seek projects that allow me to learn something new	1	2	3	4	5
16. I would enjoy working on projects with people across many institutions	1	2	3	4	5
17. I enjoy research projects that require me to work outside of the university	1	2	3	4	5
18. I like tasks at work that require me to work beyond my own school	1	2	3	4	5
19. I enjoy working with people outside of my university	1	2	3	4	5
20. I enjoy jobs that require me to interact with people in many different institutions	1	2	3	4	5
21. I have sought opportunities in the past that allow me to work outside the university	1	2	3	4	5
22. I am energized in new experiences and situations	1	2	3	4	5
23. I like the predictability that comes with working continuously for the same university	1	2	3	4	5
24. I would feel lost if I couldn't work for my current university	1	2	3	4	5
25. I prefer to stay in a university I am familiar with rather than look for employment elsewhere	1	2	3	4	5
26. If my university offered lifetime employment, I would never desire to seek work in other universities	1	2	3	4	5
27. In my ideal career I would only work for one university	1	2	3	4	5

APPENDIX G: INFORMED CONSENT FORM: INTERVIEWS

University of KwaZulu-Natal

School of Management, Pietermaritzburg

Informed Consent Document

I, Ashika Maharaj, am currently registered for studies leading to the Doctorate In Philosophy (PhD). One of the requirements to be met for the awarding of the Doctorate of Philosophy (PhD) is that I should undertake an approved research project leading to the submission of a dissertation. The approved topic which I have chosen is:

“ Expatriate Academics and Expatriate Management at a South African Higher Education Institution”.

Please note that this investigation is being conducted in my personal capacity. Should you need to contact me regarding any aspect of this research, you can do so either by e-mail on : maharajash@ukzn.ac.za or telephonically on :031-2608182 or 084 999 1938.

My academic supervisor is Dr. Karen Ortlepp, based in the School of Management on the Pietermaritzburg campus of the University of KwaZulu-Natal. She can be contacted by e-mail at : ortleppk@ukzn.ac.za or telephonically at :033-260-6168.

Information gathered in this study will include data retrieved from the interview that I request you to participate in. Please note that only summary data will be included in the report and that your name will not be included. Your anonymity and confidentiality is of utmost importance and will be maintained throughout the study.

Please note that I intend to collect information by means of an interview and that in order to facilitate the gathering of information in an accurate and efficient manner, I intend to make an audio recording of the interview. Should you not wish to consent to the making of such a recording, please make a note to this effect on the following page.

Your participation in an interview is completely voluntary. You also have the right to withdraw at any time during the study.

I appreciate the time and effort it will take you to participate in this study. I would highly appreciate your participation, as it would help me to complete this research project.

This page can be retained by the respondent

Please turn over

This page must be handed to the interviewer prior to the commencement of any interview.

Please complete the section below:

I (Full names of participant) hereby confirm that I understand the contents of this document and the nature of the research project, and I consent to participating in the research project.

I understand that I am at liberty to withdraw from the project at any time, should I so desire.

I consent/do not consent to the making of an audio recording of any interview to be conducted. [Delete if not applicable]

Signature of Participant.....

Date.....

APPENDIX H: INTERVIEW GUIDES

INTERVIEW QUESTIONS – HR SPECIALISTS

4. PRE-DEPARTURE PHASE

7. What is the typical process regarding the recruitment and selection of foreign academics?
8. What attracts expatriates to the institution? Why do you think academic expatriates might apply to this institution?
9. How are the interviews conducted?
10. Is there any type of support offered to individuals at this stage?
11. What kind of provisions, if any, does the institution make for the family in the interview process or after someone has been appointed?
12. Why do you think expatriate academics choose this institution over others in South Africa?

5. ACTUAL EXPATRIATION EXPERIENCE

8. Once the offer of employment has been made, what is the procedure regarding the international recruit?
9. At this stage, what kind of organisational support programme does the organisation offer?
10. Once the incumbent arrives, what kind of support does the Human Resources Department offer to the incumbent, his or her family and his or her Head of School?
11. What are the challenges associated with managing academic expatriate faculty?
12. What factors, in your opinion, contribute to the success or failure of the expatriate during the expatriation experience?
13. In your opinion, what value do academic expatriates add to the institution as a whole?
14. What are your recommendations to ensure the success of the expatriate's experience?

INTERVIEW QUESTIONS FOR ACADEMIC LINE MANAGERS

9. What kind of support is given to academic expatriates in your school?
10. In your experience, in your position, which do you see as the most important issues that should be addressed with expatriate academic staff in your department?
11. Do academic expatriates receive any additional training or orientation beyond what is offered to other new faculty during the initial period after arrival?
12. In your experience, what are the major challenges you face in having an academic expatriate in your department?
13. In your opinion, has there been a value-add to your department by having an academic expatriate working here? If so, what?
14. How would you describe the level of collegiality for academic expatriates in the institution and community/country in which your institution is located? Prompt for responses on each category
15. How would you define the success or failure of an academic expatriate?
16. What would be your recommendations for the success of the expatriation experience both for the institution and the academic expatriate?

APPENDIX I: RANKINGS OF INSTITUTIONS IN TERMS OF EXPATRIATE ACADEMICS FOR 2005/2010/2012

SA or other	Year			Frequency	Percent
Other	2005	Valid	Cape Peninsula University of Technology	10	1.4
			University of Cape Town	80	11.4
			Central University of Technology, Free State	6	.9
			Durban University of Technology	1	.1
			University of Fort Hare	10	1.4
			University of the Free State	1	.1
			University of Johannesburg	29	4.1
			University of KwaZulu-Natal	40	5.7
			University of Limpopo	45	6.4
			Nelson Mandela Metropolitan University	6	.9
			North West University	21	3.0
			University of Pretoria	44	6.3
			Rhodes University	74	10.6
			University of South Africa	37	5.3
			Tshwane University of Technology	26	3.7
			University of Venda	29	4.1
			Vaal University of Technology	10	1.4
			Walter Sisulu University	4	.6
			University of Western Cape	22	3.1
			University of the Witwatersrand	192	27.4
			University of Zululand	8	1.1
			Mangosuthu University of Technology	6	.9
			Total	701	100.0
	2010	Valid	Cape Peninsula University of Technology	61	4.5
			University of Cape Town	234	17.2
			Central University of Technology, Free State	14	1.0
			Durban University of Technology	10	.7
			University of Fort Hare	38	2.8
			University of the Free State	20	1.5
			University of Johannesburg	20	1.5
			University of KwaZulu-Natal	191	14.0
			University of Limpopo	34	2.5
			Nelson Mandela Metropolitan University	10	.7
			North West University	31	2.3
			University of Pretoria	106	7.8
			Rhodes University	8	.6
			University of South Africa	111	8.1
			University of Stellenbosch	4	.3
			Tshwane University of Technology	52	3.8
			University of Venda	53	3.9
			Vaal University of Technology	14	1.0
			Walter Sisulu University	41	3.0
			University of Western Cape	52	3.8
			University of the Witwatersrand	235	17.3
			University of Zululand	20	1.5
			Mangosuthu University of Technology	3	.2
	Total	1362	100.0		
2012	Valid	Cape Peninsula University of Technology	64	4.1	
		University of Cape Town	262	16.7	
		Central University of Technology, Free State	20	1.3	
		Durban University of Technology	17	1.1	
		University of Fort Hare	41	2.6	

		University of the Free State	22	1.4
		University of Johannesburg	18	1.1
		University of KwaZulu-Natal	194	12.4
		University of Limpopo	44	2.8
		Nelson Mandela Metropolitan University	11	.7
		North West University	45	2.9
		University of Pretoria	90	5.7
		Rhodes University	48	3.1
		University of South Africa	102	6.5
		University of Stellenbosch	10	.6
		Tshwane University of Technology	71	4.5
		University of Venda	75	4.8
		Vaal University of Technology	41	2.6
		Walter Sisulu University	17	1.1
		University of Western Cape	37	2.4
		University of the Witwatersrand	296	18.9
		University of Zululand	28	1.8
		Mangosuthu University of Technology	16	1.0
		Total	1569	100.0

APPENDIX J: LETTER FROM THE EDITOR

College of Law and Management Studies
University of KwaZulu-Natal

Tel: 031 260 2491
Cell: 083 566 8036
e-mail: goodierc@ukzn.ac.za

24 October 2014

To Whom It May Concern

DECLARATION OF PROFESSIONAL EDITING: Doctoral thesis by Ms Ashika Maharaj

I declare that I have edited this thesis.

My involvement was restricted to language usage and spelling, completeness and consistency, referencing style and formatting of tables and figures. I did no structural re-writing of the content.

Yours sincerely



DR CAROLINE GOODIER

