

Expatriation Success: Different Perceptions

Graziele Zwielewski, Suzana R. Tolfo

Abstract—The globalization of markets, the need to develop competitive advantages and core competencies, among other things, lead organizations to increasingly cross borders to operate in other countries. The expatriation of professionals who go to work in another country besides their own becomes increasingly common. In order to generate data about this issue, research was conducted concerning the perception of expatriate employees concerning expatriation success. The research method used was case study through a qualitative approach. This research was done through interviews with five India expatriates and five China expatriates, interview with expatriate department heads and analysis of company documents. It was found that there are differences between the organizational perception and perception of expatriates of what constitutes mission success. The paper also provides suggestions for further research and suggestions for future expatriates.

Keywords—Expatriation success, International assignments, Success factors, Success for expatriates.

I. EXPATRIATION

GLOBALIZATION has accelerated the growth of global business and multinationals, hence big companies can no longer focus their activities on a single geographic market. Global presence has become a strategic imperative and it is undeniable that one of the main factors creating competitive advantage in organizations is the accessibility and mobility of professionals who possess special skills around the world. As a result of economic liberalization, the expatriate gains importance and prominence as international transfers are the most expensive per person investment that a company can make in the globalization of their workforce. However, expatriation is not always beneficial, because when it is unsuccessful, it results in financial loss to the company and professional and emotional consequences for the professional.

The issue of premature return of expatriates to their country of origin has been a recurring and growing problem faced by multinational personnel managers. As premature return generates considerable costs, one realizes, in the literature, that companies consider successful missions expatriation those that are fully completed. The question begs, is an expatriation successful for the expatriate, if his/her cycle is completed and the organization avoids financial losses? A review of successful expatriation will be provided, followed by an answer to the questions raised herein with data from empirical research.

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II. EXPATRIATION SUCCESS

The expatriation process usually involves the appointment of a professional to a foreign subsidiary, that is, the transfer of the executive to work and live in another country, usually accompanied by his family for a period longer than one year [1], [2]. It is an intense experience for the individual and his family, mobilizing their emotional energies, leading to the creation of expectations and making the individual face situations he/she and his/her family were not prepared to handle[3].

The success of expatriation, according to [4], depends on the ability of organizations to identify talent within their teams and create career systems that include international experience as a valuable opportunity for the development of competent national talent, reducing the chances of a premature return. A set of expatriation success indicators was developed from an organizational vision, which are: a) intercultural adjustment, b) effectiveness at work and c) completing the appointment without premature return [5], [6]. That is, in order for an expatriation to be considered a successful mission, the expatriate needs to feel a psychological comfort in living and immersion in the host culture (adjustment), so that he/she can maintain his/her productivity at the expected level (effectiveness at work), while not returning to its country of origin prematurely, but only at the end of the mission set by the organization (completion of assignment) [7].

Expatriation success also depends on the cost planning activities, the appropriate selection of the terms of the mission and documentation, the relocation process, cultural aspects and guidance, language training, compensation management and career process, assistance to spouses during the immigration process, among others [5]. All these precautions are important, since an expatriate's cost, including equalizing cost of living, ranges from 300 hundred thousand to one million dollars during the mission [8]. The cost of premature return is approximately two billion dollars, including the calculation of reduced productivity, loss of market share, loss of competitive position, disintegration of the team, damage to relationships with customers and suppliers, loss of image and reputation of the company market [9].

The expatriation is considered successful, for [10], when four levels are completed: the first level is the good adaptation of the expatriate; the second level is reached when the expatriate remains in the host country and the company does not request early return; the third level, when expatriation mission is fulfilled; and, finally, the fourth level is the return to the country of origin, that is, repatriation.

It is noteworthy that the authors who address the success of expatriation worry about the loss of investments made by organizations: prize the proper choice of professional, good

adaptability in the country of destination and how to avoid his/her premature return. However, in the point of view of the expatriate, is a successful expatriation one that completes its cycle and avoids financial losses for the organization?

III. RESEARCH METHOD

This article is based on a master dissertation that addressed quality of life at work and expatriation, emphasizing a qualitative methodological and theoretical perspective that seeks to understand the meaning attributed by people to a certain phenomenon, identifying the socially constructed reality through these meanings, without seeking, however, quantification, intensity or frequency of data [11].

In this research, the authors placed emphasis on qualitative approach to achieve significant knowledge of phenomena, given that this approach performs a fundamental approximation and closeness between subject and object, since both are of the same nature : "[...] which actions, structures and relationships become meaningful" [12]. For the authors, qualitative research allows the analysis of a discourse that goes beyond the analysis of the message, but penetrates the latent meanings of the contents. This approach does not provide numerical criteria for defining a sample. In total, 5 India and 5 China expatriates were interviewed, who are employed in a bus body manufacturer from the south of the country (BRAZIL).

We used the case study method, which, according to [13], is a research strategy which focuses on understanding the dynamics present in individual scenarios. It can be used to achieve various goals including: giving a description, test or create theories. As a research strategy, case studies allow the researcher to have a holistic view, and meanings from real life situations of the subjects.

We chose a Rio Grande do Sul company for this research, in this paper called Ind.M, which currently has 82 expatriate employees, in the following countries: South Africa, Argentina, China, Colombia, Egypt, India, Mexico and Russia. Considering the statement made by [7], that intercultural adjustment acts as a central element in the success of expatriation, i.e. the non-premature return of expatriates, we attempted to select as subjects in this study, professionals who are expatriates in Eastern countries, as the culture of these countries are very different from the Brazilian culture. We adopted the assumption that the greater the cultural differences are, the greater the difficulties of relocating to adapt to the host country.

The search for the information needed for this research was obtained through interviews with expatriates and the expatriate department manager (primary sources) and analysis of company documents (secondary source), involved in the research.

We requested from the Human Resources department head of Ind.M the email addresses of expatriates, and sent an email inviting them to participate in the research. When the expatriate accepted to participate, ethical issues were discussed, and then an interview via Skype was scheduled with an average duration of two hours each.

For treatment of the data collected in the analysis unit "individual," the interviews with employees were transcribed, and through content analysis, one we had access beyond the meaning of the transcribed material, understanding the interviewee's discourse meaning [14].

As for the analysis unit "organization," an analysis of the content of the interview with the management of the expatriate department was performed, as well as a review of documents provided by the company (Expatriation Policy, Remuneration and Career Policy, Employment Agreement Accessory Pact). These two forms of analysis involve similar techniques used by the author: the encoding of the information after the identification of the subjects and the establishment of major categories. The information collected through the analysis of documents was originally recorded in a protocol information record and were subsequently grouped and categorized according to the theoretical basis adopted.

IV. ANALYSIS OF RESULTS

Three documents provided by the Expatriates Department of Ind.M were analyzed: the Expatriation Policy, which describes the rules and regulations, as well as procedures for relocation of an employee; Compensation and Career Policy, which defines the financial returns and expected contribution of the expatriate, as well as important career management items; and the Accessory Pact, which is a contract signed between the parties - company and expatriate - dealing with items which are not covered in previous documents. As part of the analysis of the results, the analysis of the contents of documents and interviews with participants will be presented.

Based on the analysis of the documents it is apparent that Ind.M. does not have a clearly defined concept of expatriation and expatriate in its documents; there is only a definition of professionals that are transferred to other units of the company and that expatriation is regarded a temporary situation of the professional's career, that is, expatriation is not permanent. As for the manager of the department responsible for expatriation, in this work referred as M., the definition of this concept is clear: "*transfer of an employee abroad for a period longer than 2 years*" M.

No definitions were found or even references were made to the concept of successful expatriation in any documents of the company. There is an observation that if the termination occurs upon initiative of the expatriate, he/she will bear the costs of returning to his/her country of origin. We notice the presence of some principles that guide the expatriation department policies, according to the Expatriate Policy and Accessory Pact, which refers to "financial benefits", a 25 % increase while the professional is expatriated, in addition to providing the payment of expenses such as accommodation, food, transportation for expatriates who are unaccompanied by family and reimbursement of children's education, and furnished home for expatriates accompanied by their families.

Success for Expatriates

The choice of participants was intentional and based on convenience, as we sought Eastern countries expatriates, in

this case, India and China. We selected expatriates in positions ranging from operational to management, and six of them do not have college degrees. We have not found any important age relationships.

The concept of expatriation success was verified by empirical data collected during interviews. A successful expatriation, according to three expatriates, involves the family's involvement in the process, and for the other three, the expatriation process must be accompanied by training, supports, support network and emotional preparation. Two of them believe that having a clear idea of criteria involving expatriation, as well as the duties, rights and obligations of the parties, significantly helps achieving mission success. They also underlie success involves the existence of a goal, a reason for being expatriated.

According to Table I and the quotes below, without this goal the expatriate is more susceptible to quit. According to two expatriates the purpose is "[...] a professional experience in an area I did not know and to become an expert in the area. To achieve more professional experience, and who knows, in the future, enjoy professional advantages" (Hannamanta); and "I'm basically involved in this project because my boss invited me, so my confidence in him gave me the courage to cross the world" (Ken).

The success of the mission, for the manager, depends on the alignment of salary expectations of both of the sides, the organization and the professionals to be transferred. So the department uses compensation packages and benefits to motivate future expatriates. As for the failure of a mission, it is linked to the premature return of the professional due to non-cultural adaptation, most often, due to family's non adaptation.

Expatriation also brings attractive financial benefits for professionals who accept the mission [15], [16]. Four of these expatriates believe that salary is important for the success of expatriation, as shown in Table II and expatriate Praveem's

report: "Yes. A lot. The salary was very important to decide come here." Among these four, expatriate Chidu says: "The salary is not important for the success of expatriation, but it is important to keep me here" and Rakeshi says: "Yes, but the knowledge that you will obtain here is probably more relevant than if you spend ten years in the company."

It is noticed that although expatriates consider compensation important, they do not believe that this is the main reason for having accepted expatriation. For them, the expatriation success involves a higher goal than just financial performance, which complements the claim made by some authors, for whom successful expatriation is one that is not ended prematurely [4], [7], [10].

Some expatriates consider that salary is definitely not important for a successful expatriation, as reported by expatriate Guanxi, for whom success depends more on future prospects for professional growth than immediate salary. But in order for an expatriate to maintain this condition, a good salary helps not giving up on the mission. Like him, two other professionals are radical in stating that they do not consider the salary as important for success. But three others consider that, although salary is important, there are other relevant factors, such as knowing how to manage the distance from the family, pension benefits and the experience and knowledge they acquire during the mission.

As expatriate Hannamanta says:

There has to be a "why", sincerely, there has to be a goal [...]. If I were to think financially, I did not need to go back, but I did it to have one more professional experience in an area I did not know and to become an expert at work.

TABLE I
EXPATRIATION SUCCESS, INDIA AND CHINA EXPATRIATES

Names India / China	To be successful (India)	To be successful (China)
Hannamanta / Nihao	there has to be a "why", an objective	the professional must know exactly what he/she wants and be courageous
Ravi / Ken	1)Emotional Preparation 2) a trial living period, to enable the professional to experience what he/she will face in India 3) bringing the family together	One has to include the family in this "you". One also has to increase knowledge, have experience.
Rakesh / Guanxi	1) Come here with a set and strong objective 2) The company prepares the professional not only culturally, rather, prepare him/her for anything 3) The company should think of the personal side of professionals (be able to speak to the family, relax, have more leisure time)	As expatriation is a mission, and that is my perception, it requires planning and not be dealt as a bet by both parties. The best resources should be chosen and made available, both human and material. Training and technical support should be provided during the adaptation period. Clearly establish which are the duties, rights, and obligations of both parties in the process.
Praveem / Laowai	As I said, the person has to adapt to the location, he/she cannot resist other people's opinions. Here one has to adapt to the Brazilian personnel as well. Good preparation by the company also helps achieving success.	Clear and assertive criteria choosing the expatriate; the family's involvement on the negotiation process; support for the expatriate and the family; good preparation before initiating a process. The success requires a lot of team work, the professionals dedication and perseverance.
Chidu / Tyi	Personal growth (talking to friends, have time to reflect and think about life) and professional growth and I don't know what is going to happen when I return to Brazil, but former expatriates complain a lot about this. Because when you come back to Brazil, you don't know where you are going to work, because there is somebody already doing your job.	Have a lot of work and results. There is no success without results, so we have to focus on work a lot.

Source: primary data collected by the researcher

TABLE II
THE IMPORTANCE OF SALARY IN EXPATRIATION, FOR INDIA AND CHINA EXPATRIATES

Names India / China	Is Salary important to achieve success? (India)	Is Salary important to achieve success? (China)
<i>Hannamanta / Nihao</i>	No	Yes
<i>Ravi / Ken</i>	The financial issue was very important for my decision. However, when you get here you stay one year far from your family, and you realize that money is not everything. Unfortunately, only the financial side does make it worthwhile.	Yes, you have to be practical, you have to think about the future. I tell my son: "son, I am traveling because I want to give you this, to provide you that". Then my salary is important. It was good and he is good.
<i>Rakesh / Guanxi</i>	Yes, but the knowledge you will achieve here is probably more relevant than if you spend ten years in the company. So it depends of your career's phase. I am in the sacrifice phase, to be willing to things I don't link to achieve something more.	No. I believe that the success of an expatriation depends more on future professional growth expectations than the immediate salary.
<i>Praveem / Laowai</i>	Yes, a lot. Salary was very important for deciding to come here, otherwise, one does not come. For us, to be far from everybody, your family, your friends, your family environment, and your city...To come here, it must be financially worthwhile. If the person comes here thinking he will make an "x" amount, but then the story changes, he becomes demotivated and demotivation is no good for the company.	Salary is very important for the decision, however, it is not the most important, because if the employee enters this process, he is certainly seeking mid and long-term gains, which together, become more important than the financial issue.
<i>Chidu / Tyi</i>	It is not important to achieve success in expatriation, but it is important to keep me here.	No. It is about third or fourth place in importance. Professional recognition, growth opportunity and professional challenge are more important.

Source: primary data collected by the researcher.

TABLE III
EXPATRIATION FAILURE FOR INDIA AND CHINA EXPATRIATES

Names India / China	To be unsuccessful (India)	To be unsuccessful (China)
<i>Hannamanta / Nihao</i>	It means not fitting into the work group and having to live alone	Go back to Brazil, not having a supervisor job, for instance.
<i>Ravi / Ken</i>	Go only for the money, not being able to enjoy the family	A person wishes to adapt, but only sees the negative side.
<i>Rakesh / Guanxi</i>	Lack of clarity	The professional feels powerless to deal with a certain situation.
<i>Praveem / Laowai</i>	not know what happens with the expatriates". The sensation of abandonment of the professional lowers the level of motivation leading the profession to quit!	The person does not adapt.
<i>Chidu / Tyi</i>	Certainly, for the professional the result is necessary for considering success or lack thereof. Things have to fit in together. A number of other things (day to day stuff) time will tell.	The expatriation would not be successful if you come here and do the same thing you did in Brazil.

Source: primary data collected by the researcher

To have more professional experience, and who knows, in the future there will also be a professional compensation.

The interviewees also mentioned other aspects of successful expatriation, answering other questions during the interview: training targeting emotional preparation, support during expatriation, opportunities for career growth and professional challenge, were also identified as synonymous with expatriation success. Expatriation failure factors were also mentioned, according to Table III. To respondents, this means going back to Brazil not having the expected return (a new position, for example, it's more the professional's expectation than an agreement between the parties), not learning new things, inability to adapt, not having the opportunity to apply all the know-how acquired during expatriation and not being well with the family.

For the department manager, the failure on an expatriation mission would be the premature return of a professional due to non-adaptation of the family in the destination country, so, for this reason, the company seems not to encourage the expatriation of the family with the professional, for, among respondents, only one went with his family. This perception matches the definition of success for the organization, presented at the beginning of this work, however, goes against the perception of success presented by the expatriates in this research. Among the expatriates, we find a balance between valuations (salary and career benefits), they all believe that

they receive a fair and adequate salary, which contributes indirectly to the idea of expatriation success, but success is directly related to the mission which brings a return to the professional, regardless of the end of the expatriation period.

Expatriate perceptions are aligned [17]: they have career and knowledge expectations. Besides the financial benefits almost always considered by most expatriates, other reasons lead expatriates to this experiment: to share and add new knowledge, develop bolder projects, expected better jobs, better education for their children and opportunity to learn a new language.

Despite not having appeared in the direct answers, referring to success, one could perceive throughout the interview the anxiety generated when dealing with repatriation. For them, the opportunity for growth and recognition brought by expatriation in professional life, are factors that contribute towards the success of an expatriation, and therefore not knowing how things will turn out causes some discomfort, since the organization does not have a clear career policy related to the expatriation process.

One perceives a mismatch of the perception of expatriation success criteria between the organization's and expatriate's vision, as can be seen in Fig. 1. Success In the organization's point of view is considered the moment the expatriate returns to the country of origin in the anticipated completion of the mission date, without premature abandonment, without

financial losses, depending on a good salary offered to the expatriate. As for the respondents, salary is not a success factor, since the expatriation success can only be determined after the period considered by the company as important to achieve success: the end of expatriation.



Fig. 1 Success of expatriation for the Organization and Expatriates

For expatriates, mission success happens when there is a recognition and appreciation of the professional experience experienced abroad, when the expectations of the professional concerning expatriation are met, for example, new job proposals offered by the company to the professional, direction of the expatriate's career and family welfare; for them, the family involvement, preparation for the mission and clarity of criteria concerning the work to be performed in the host country, are mission success factors.

So that this difference in perceptions of the same situation does not affect the career and personal life of expatriates, but also helping reduce the risk of financial loss for the company, it is understood the leveling of expectations before deciding whether to undertake a mission is essential, since often the company is investing in items which are not considered essential for the expatriate, generating unnecessary costs. This might be considered a failure of communication between expatriate management and expatriates themselves, as management claims the alignment of expectations on both sides to be of utmost importance (expatriate x organization), but the company considers critical to success, higher salary expectations, while not mentioning all other expectations commented herein, concerning the personal and professional lives of expatriates.

V. CONCLUDING REMARKS

Studies on expatriation are still recent in Brazil, thus, we consider this work could contribute towards scientific knowledge as well as for organizations, assisting them in choosing and targeting benefits offered to expatriates. Through part of the master's research, it was possible to verify the expectations of these professionals and the expatriation Department's management regarding a successful expatriation. The main question asked at the beginning of this article was

answered, for a mismatch was identified in the concept of successful expatriation from the organization's perspective (benefits package and no premature return) and from the expatriates' perspective (professional development, family involvement, emotional preparation for expatriation and clear criteria concerning the future direction of job and career).

The authors believe that if the company uses a selective process based on skills and personality traits and also considers the professional's desire to have an international living experience, the salary would be an important item, but not as critical to the success of the expatriation as the company believes it. Professional development, learning new skills and opportunities brought forth from this experience could be presented as the main benefits of expatriation, reducing direct costs to the organization, which would have costs which are unnecessary in the expatriate's point of view. It appears that the main expectation of expatriates are in that this experience will result in the development of a more promising career within the organization, which has not happened and that generates uncertainties for the future.

On the whole it appears that the international management of personnel in the organization is not very systemic, which is reflected on the way expatriates and expatriate management perceive a successful process: based on a few peripheral aspects.

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