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FACTORS AFFECTING EXPATRIATE PERFORMANCE

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ABBREVIATIONS

AE	Assigned Expatriate
HCN	Host- Country National
HIPO	High- Potential Professional
HQ	Headquarter
HR	Human Resource
IA	International Assignment
IBT	International Business Travelers
JD-R	Job Demands-Resources
KSA	Knowledge, Skills and Abilities
MNC	Multinational Company
PCN	Parent-Country National
SIE	Self-Initiated Expatriate
TCN	Third-Country National
UCT	U-curve Theory

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ABSTRACT

Purpose No company today, regardless of size and industry, is isolated from the impact of globalization. Recently, there has been rapid increase in global activity and global competition. At the same time, managers and employees from headquarters and regional centres of multinational companies (MNCs) are posted abroad in large numbers. Today, short and long term international assignments (IAs) are thus part of the job. Building on the above described phenomenon the aim of the present thesis is to identify the main factors that contribute to international assignees' job performance and result in success or failure. Additionally, the paper also aims to provide the reader with deep insight on the role of such factors. Understanding cause and effect that predict expatriate performance outcome is particularly important because such assignments have significant financial and emotional consequences, both for the MNC and for the individual as well, especially if it ends as a failure.

Design/methodology/approach Two-fold exploratory mixed method research design was deployed within the empirical study to find answer to the research question and to reach the research objectives through 16 semi-structured interviews with expatriates (non-assisted awareness). Respondents were further asked to fill out an online survey in which they were asked to evaluate certain skills/abilties (assisted awareness) based on their perceptions.

Findings By applying content analysis the difficulties faced by international assignees are primarily related to general adjustment to the new environment, which greatly determines the outcome of any international assignment. The successful acquisition of it yields job satisfaction, while the lack of such ability can be a root of overall dissatisfaction and poor performance. Furthermore, applying basic statistical analysis it was confirmed by the survey results with 90,69% of respondents expressing agreement on it. Communication skills proved to be second most important affecting factor, while less importance was attributed to technical skills and family factors.

Research limitations/implications There are a number of limitations to this study that should be acknowledged. Due to time constraint convenient and volunteer sampling (nonprobability sampling) were applied in which assigned expatriates and self-initiated expatriates were both studied, which could affect the generalizability of the findings. Another limitation is that findings are based on self-reports, without having any feedback/ evaluation from local employees or direct bosses.

Value of the study Present study provides suggestions for managers-to-be on how to prepare for any upcoming international assignment. It also serves as useful base for HR departments and their selecting proccesses.

KEYWORDS: Globalization, International Assignments, Performance Outcome

1. INTRODUCTION

As first part of the study this section presents the background of the topic, namely the growing number and significance of multinational companies, and their widely applied practise, i.e. international mobility. It also identifies the research problem as the high failure rate and the associated fairly high cost. Research objectives, based on the research question, are also developed. The chapter closes with outlining the structure of the thesis.

1.1. Background of the study

Multinational companies (MNCs) grow in number and influence, and in parallel the role of expatriates in such MNCs grows in significance (Dowling, Welch & Schuler 1994; Brewster & Scullion 1997; Bonache & Brewster 2011). As a consequence of increasing globalization, and therefore a rapidly changing environment, international mobility is becoming a more common phenomenon widely applied by multinational companies (Bae & Rowley 2001: 402). Being foreign is no more distinctive, but rather normal or alternatively, as an Australian professor, John Lechte characterizes foreignness can be viewed as "an escape from the boredom and banality of the everyday", in either way intrinsically stimulating (The Economist 2009: 3).

Harvey and Moeller (2009: 275) claim an emerging trend exists according to which there is a growing need to use expatriate managers who are typically relocated overseas in leadership positions in order to ensure alignment that is needed for global integration. Firms are required to manage an increasingly diverse workforce with expatriation being just a subset of this challenge (Hung-Wen 2007: 403).

Tung (1981: 68) states that there is an increased demand for people who can operate effectively and efficiently in a foreign environment, but further raises concerns regarding the failure rate and program misfits, and calls for action to ensure better performance abroad. Such action is further supported by Arthur and Bennett (1985: 99),

claiming the high failure rate and the associated fairly high costs of international assignments (IAs), they suggest that solution has to be found.

According to the results of the 2012 Global Relocation Trend Survey, 64% of companies reported an increase in their assignee population, which is a significant increase compared to the previous year's 43%. (Brookfield Relocation Services 2012: 9). Although a wide range of economic pressures confront multinational organizations, yet 88% of respondents expect international assignments to increase or remain the same. Findings show that primary challenges for mobility managers include the need to find cost efficiencies while delivering high levels of employee support, capturing "the value" realized from international assignments. Consequently, besides the growing number and frequent use of expatriates attention to (cost-)efficiency and performance should be paid as well. (Business Wire 2015).

Brewster and Scullion (1997: 32) claim that the active international trade, happening in Europe especially among newly international organisations, led to a growth in the overall number of expatriates. Additionally, it is increasingly recognised that the human and financial costs of failure in the international business arena are considerably more severe than in domestic business. Since the performance of expatriates is critical to the success of the international projects on which MNCs are working (van der Heijdena, Johannes, van Engena & Paauwea 2009: 832), special attention should be devoted towards expatriates.

As another evidence for the use of international assignees Toh and DeNisi (2005: 138) claim that the valuable experience and insights that expatriates gain can be a form of competitive advantage, meaning that a firm's business startegy will be guided by those who clearly understand the companies' worldwide operation and markets.

All in all, the above mentioned researchers and their arguments clearly state there is need for studying the growth of multinational companies' widely applied practise of transferring employees from one country to another. Successfully operating and reaching target goals in a different environment certainly requires more attention and expertise, in which the role of the individual is decisive.

1.2. Research question and research objectives

Regardless of the growing or stagnating use of the expatriate cadre, present study claims that it is vital to understand the process of expatriation and the benefits they can bring to any MNC. Therefore, the intent of this study is to find out factors that affect expatriate performance in the new environment, and to examine the impact of the most dominant factors.

Thus, the research question is:

How is expatriate performance affected by certain factors?

Meanwhile, research objectives are:

Objective 1 is to identify predominant reasons for expatriation success and failure.

Objective 2 is to gain deeper understanding on the role of such factors.

1.3. Structure of the thesis

Present study consists of seven chapters that are build on each other and therefore smooth transition is ensured in between. Chapter 1, i.e. introduction, aims to set the background for the study, create interest in the topic and lay the broad foundation for the research problem. It also identifies the research question and objectives.

The following two chapters, Chapter 2 and 3, serve as an overview of relevant literature. Key theory and concepts are discussed, arguments of main writers are presented. The first theoretical chapter focuses on the concept of expatriation, and provides classification on expatriates regarding three aspects, the initiator, the country-of-origin, while it also describes some alternative forms of international assignments, i.e. Global travelers. It also unfolds various motives why expatriates are used, i.e. roles. The second theoretical chapter concentrates on global performance management, mainly from the individuals' point of view. Performance is examined as a four stage process, as an outcome of determining factors, which can be either success or failure. Related to the

model of expatriate performance and possible outcomes the chapter closes with the discussion on the importance of time. Both theoretical parts open with a short introduction and end with summary, ensuring smooth traceability for the reader.

Following the two theoretical chapters, under Data and Methodology, the process of the work and the applied techniques are described: the chosen multi-method research design, including data collection and analysis, as well as validity and reliability are presented.

In Chapter 5 findings from the qualitative analysis are discussed first in the light of the main theoretical concepts, meanwhile the quantitiave analysis derived from the online survey results are presented and interpreted.

Chapter 6 aims to discuss the findings of Chapter 5 through the lens of theory, as it compares the findings from the theoretical and from the empirical part. At the same time research question and objectives are answered.

Finally, present thesis ends with theoretical contributions, managerial implications, limitations of the study, followed by suggestions for future research.

2. EXPATRIATES

In this chapter applicable concepts and theories, arguments of main writers in the field and definition of key concepts are discussed that guide the reader through the process of expatriation. Earlier in the paper the importance of expatriates in the international business arena was stated. As the first main part of the paper the aim is to prove that the phenomenon is worth researching. Firstly, two definitions are provided in order to ascertain the background of the research on which the rest of the paper builds.

2.1. The concept of expatriation

Since the phenomenon of expatriation has been studying for many decades, it is not suprising that in the body of literature several definitions for expatriation were found. Two definitions are discussed next. The first one presents the basic elements that are necessary for the title, meanwhile the second definition provides more insight by describing these international assignees with some distinctive characteristics.

Based on the rather simple definition given by Brewster and Scullion (1997: 32) expatriates are employees transferring from one country to another. Such definition has two requirements regarding the eligibility of the status. Firstly, the person has to work for a given company that has some other subsidiaries outside the home country. Secondly, the assignment must be in a foreign subsidiary, therefore the employee needs to cross borders and work outside of his/her home country, and consequently of comfort zone.

Supporting the fact that the phenomenon of international mobility is widely researched, since the late 1990s many improvements were made, resulting in a more sophisticated definition. According to Evans, Pucik and Björkman (2011: 130-137) expatriation is a form of direct, hierarchical, personal control, meaning that headquarters' (HQ) executives often trust their expatriates more than they trust their local employees. In this case trust is added as an important dimension, meaning that expatriates are more

considered as trusted representatives of the parent company. They further claim that expatriates are relocation specialists, i.e. trained and skilled representatives of the parent company. They have global mindset as strategic focus when competing in the global marketplace; and deeper, more clear-cut understanding of what it means to do business globally. Literature also suggests they better fit current global market demands than employees without such skills, knowledge and experience.

Consequently, it is claimed that expatriation has always been and thus remains one of the foundations for the implementation of global strategy. The global-local dilemma arises regarding a shifting locus of decision-making to affiliates while at the same time assuring that a global view prevails.

2.2. Expatriate categories

After learning of expatriation is interpreted there is an urge for further analysis. There are several ways to differentiate expatriates, thus in the following section different taxonomies are discussed to provide the reader with some basic understanding on the complexity of international assignees. Based on the initiator of the international assignment assigned expatriates (AE) and self-initiated expatriates (SIE) can be distinguished. Company expatriation, based on the country-of-origin of the assignee and the location of the assignment, may take three forms: Parent-Country Nationals (PCN), Host-Country Nationals (HCN), and lastly, Third-Country Nationals (TCN) can be distinguished. Recently, due to the difficulties in managing expatriation and repatriation, some alternative forms of traditional expatriate assignments have evolved: flexpatriates, short-term assignees, and international business travelers (Shaffer, Kraimer, Yu-Ping & Bolino 2012: 1283), which are also presented.

2.2.1. Initiatior's aspect

Appendix 1. compares and contrasts the two different forms of expatriates based on several aspects. Clearly, there are conspicuous similarities and differences. Assigned

expatriates, or as also referred to traditional expatriates, are sent abroad by their employing companies to return some years later (Biemann & Andresen 2010: 430). Non-organization-sponsored, self-initiated expatriates, on the other hand, are individuals who relocate voluntarily to a foreign country on their own initiative, independently of any employer and without organizational assistance, and are hired under a local, host-country contract (Jokinen, Brewster & Suutari 2008: 979). They claim that SIEs is not only a widespread phenomenon, but they are, concomitantly, widely used by organizations.

SIE is a rapidly growing type of expatriation, that is short-term learning assignments of young high potential professionals (HIPOs) who move across borders primarily for the purpose of building experience and developing their careers (Evans et al. 2011: 141). Therefore, the fundamental characteristic that distinguishes self-initiated international workers and expatriate assignees is the initiator behind the decision to work cross-border. While the international experience of AEs is initiated by an internationally operating company, in the case of SIEs individuals themselves make the decision to live and work in a foreign culture (Biemann & Andresen 2010: 432). They resign from their job and relocate abroad, finding a job in the host location (Cerdin & Selmer 2014: 1281).

On the other hand, in both types of expatriates work experience may offer extensive learning and development opportunities for individuals (Inkson & Myers 2003: 180). Furthermore, both AEs and SIEs operate on more challenging and broader tasks abroad than in the home country (Suutari & Brewster 2000: 425). Additionally, both groups are liable to the requirements of adjusting to the foreign environment and for social interaction with locals (Jokinen et al. 2008: 982).

2.2.2. Country-of-origin aspect

Depending on the international approach that a company may follow three types of international assignees can be distinguished (Harzing & Pinnington 2011: 187). Parent-Country Nationals (PCNs) are used by companies that follow ethnocentric approach,

and therefore their use is preferred when high level of expertise is needed. Such expatriates are employed in positions as managers, supervisors, experts, or trainers.

As a complementary model of global staffing, Harvey, Speier and Novicevic (1999: 459) identify host-country and third-country nationals as linking pins between the organizations' HQs and their foreign subsidiaries. Host- Country Nationals (HCNs) are local citizens of the host country, where locally accepted practises are developed under the supervision of local managers. Among the advantages that such assignees may bring to headquarters are the understanding of local contexts and cultures on foreign operations in transition economies, easier communication with host units and local public authorities, and increase the multicultural profile of the organization with new ideas and perspectives (Mayerhofer, Hartmann & Herbert 2004: 648). Typical positions are supervisors, administrators, and manual workers. (Harvey et al. 1999: 459).

Third- Country Nationals (TCNs) are inpatriates from countries other than the parent country of the multinational, or emigrants living in the host country, but considered as locals. Two driving factors of TCN employment are the scarcity of suitable candidates for IAs in the home country, and attempts to keep the costs of expatriation low. Companies following geocentric approach would hire the best qualified individuals, irrespective of country-of-origin or nationality, and so their proportion in the expatriate population is increasing. (Evans et al. 2011: 157).

Expatriation is typical for companies following an ethnocentric approach, while polycentric, geocentric and regiocentric approaches of companies especially use inpatriation, which is the process of transferring third-country national managers into the domestic market of a multinational corporation on a semi permanent basis (van der Heijdena et al. 2009: 831).

These international assignees working outside of their own national borders have collectively become vital for the success of multinational firms. They fill critical staffing needs in subsidiaries, manage key projects, transfer knowledge and corporate culture across geography, work on multinational teams, and perform many other critical tasks for their firms. (Caligiuri & Tarique 2005: 2).

2.2.3. Alternative forms: Global travelers

Organizations no longer consider permanent transfers to be the only method for corporate integration and transfer of knowledge (Cappellen & Janssens 2005: 348). Increasingly they have sought to find other ways of developing global skills or conducting global businesses, by creating new types of global work experiences in a variety of host countries, or at the corporate hearquarters (Shaffer et al. 2012: 1283). Mäkälä, Suutari and Brewster (2014: 226) refer to people involved in such careers as 'global careerists', having repeated international work experiences. Among the nontraditional corporate global alternatives short-term assignments, flexpatriation and frequent international business travels (IBTs) are included **(Appendix 2.)**. It can happen that a firm requires a short stay overseas, typically from three months up to a year (Shaffer et al. 2012: 1283). Such short-term assignments are preferred by strategic and technological consulting firms, law and accountancy companies, and construction firms (Baruch, Dickmann, Altman & Bournois 2013: 2378). Frequent flyers of international work, i.e. flexpatriates, are sent by their organizations to various parts of the world to perform shortterm assignments and return 'home' soon after (Mayerhofer et al. 2004: 647). They can be, for instance, the firm's lawyer, an IT expert, or a negotiator (Baruch et al. 2013: 2378). IBTs take multiple shorter, usually lasting for 1-3 weeks, business trips in various locations, without the accompanying family (Shaffer et al. 2012: 1287).

Shaffer et al. (2012: 1290) state that global travelers are usually chosen by line managers because they have a requisite skill or expertise that is needed to solve a particular problem or assist with a project, which suggests that the primary purpose behind these alternative forms are the same as in case of traditional expatriates. Although, some differences do exist. For instance, such alternative forms of international assignments usually last for a shorter time period (less than a year), the degree of family involvement is not as high as in the case of traditional expatriates, and compensation remaining home-based.

Overall, the clear benefits of such global travelers are flexibility, simplicity, cost-efficiency and global boundary spanner for the MNCs, and lower degree of commitment

from the individuals' point of view, which reduces the feelings of stress and frustration caused by repatriation.

Table 1. Expatriate categories (Own compilation).

Aspect	Expatriate categories
1. Initiator behind the IA	Assigned Expatriate, Self-initiated Expatriate
2. Country-of-origin, location of assignment	Parent-Country National, Host-Country National, Third-Country National
3. Alternative forms: Global travelers	Short-term assignments, Flexpatriation, Frequent international business travels

2.3. Expatriate roles

There are many reasons why expatriate managers are transferred overseas in different positions. In the following different typologies are presented, based on the underlying motives behind the international assignment.

1.) Edström and Galbraith (1977: 248) identify three key organizational functions why companies move resources across national boundaries, i.e. send expatriates to international assignments. Firstly, expatriates are used to fill different niches or positions when there is a skill gap in the location, for instance to developing countries where there is a lack of qualified local nationals, but specific talent is in need (Bonache & Brewster 2001: 163). Secondly, a major motive is for management development purposes, during which a manager can obtain international experience and meanwhile develop professionally. In essence, the primary objective here is to generate a greater and more advanced set of skills that will allow him/her to perform more effectively. Lastly, they are used to organizational development, which goes beyond management development purpose, ensuring control and coordination of international operations

through normative control and/or informal social networks. In some cases these motives are overlapping. (Evans et al. 2011: 139).

2.) Pucik makes a distinction between demand-driven and learning-driven international assignments **(Figure 1.)**. While a demand-driven assignment is designed to fix a problem or for reasons of control, a learning-driven views cross-border mobility as a potential learning tool, increasing the number of assignments in which the primary driver is individual or organizational learning. Many assignments combine both elements, but in most cases it is clear which of the two dominates. (Evans et al. 2011: 140).

	Demand-driven	Learning-driven
Long	**CORPORATE AGENCY** Control/knowledge transfer	**COMPETENCE DEVELOPMENT**
Short	**PROBLEM SOLVING**	**BUILDING EXPERIENCE**

Assignment duration (vertical axis) — Assignment purpose (horizontal axis)

Figure 1. The Purpose of Expatriation: Demand-driven versus learning-driven.

3.) Harvey and Moeller (2009: 275) state that the use of expatriates is a realistic tool for exercising control over foreign subsidiaries and business units. The responsibilities of

these middlemen in the global context are heightened; and therefore, have direct impact on the organizational performance, and at the same time significant impact on the success of MNCs. Bonache and Brewster (2001: 145) further argue that the fundamental role attributed to such assignments has been that of control and coordination of operations. Expatriates are assigned to fill different positions, such as auditors, risk managers, management control managers, computer experts, and commercial managers.

4.) Research on international staffing has identified a number of principal reasons for employing HQ expatriates in MNCs (Brewster & Scullion 1997: 33). In this classification the number one reason is the lack of availability of management and technical skills in some countries. Secondly, control of local operations was found, that goes hand in hand by maintaining trust in key foreign businesses. Lastly, expatriates are used for management development purposes.

4*) In relation with controlling foreign subsidiaries different roles evolved, namely The Bear, The Bumble Bee and The Spider (Wurtz 2015). In organizational development expatriates are used as (informal) coordination and control strategy, where socialization into corporate culture and successful informal information network creation between headquarter and subsidiary takes place (Harzing 2001: 366). The different animal metaphors are used to illustrate the different type of control mechanisms that a headquarter uses towards its subsidiaries to ensure people behave the proper way.

In The Bear role, upon expressing a certain level of dominance and threat, expatriates are tools to replace or complement HQ centralization of decision-making and to ensure immediate oversight of subsidiary operations. Bumble-bees, based on socialization and the creation of informal communication networks, facilitate the cross-pollination between the various departments or business units. The Spiders' top priority is to weave this informal communication network throughout the MNC (Harzing 2001: 369).

5.) Hays (1974: 29) categorizes the general types of expatriate job assignments as structure reproducer, technical troubleshooter, operational expatriate and chief executive officer. A structure reproducer is sent overseas to build in the foreign subsidiary a similar structure to that of already working in some other part of the firm. A troubleshooter's main goal is analysis and problem-solving, while an operational

expatriate is assigned to perform as an acting element in an existing operational culture. The chief executive officer is used to supervise and direct the whole foreign operation.

6.) Alternatively, international assignments can be viewed as a knowledge transfer mechanism (Bonache & Brewster 2001: 159). According to this aspect, expatriation is a basic mechanism to transfer tacit knowledge, since such knowledge cannot be codified or contained in manuals, but can only be observed through application. Tacit knowledge between different units of the company can be transferred by assigning employees to the foreign operations, as a great amount of information moves through their hands (Riusala & Suutari 2004: 745). A special link exists between expatriates and competitive advantage of a company (Bonache & Brewster 2001: 163), meaning that expatriates through their knowledge of the company's products, technology, organization, and culture and their own learning experience can provide added value for a company (Brewster & Scullion 1997: 37; Evans et al. 2011: 137). As van der Heijdena et al. (2009: 832) further claim expatriates gain market-specific knowledge, personal skills, job-related management skills, network skills, and general management skills that are vital for competitive advantage.

2.4. Summary

Chapter two of the thesis desribes expatriation, or the transfer of trusted employees from one country to another, and the several forms it may take. Besides the growing number of traditional international assignments the number of self-initiated expatriates is rapidly increasing who voluntarily decidet o leave their home country in the hope of finding satisfaction in a foreign country. Depending on the country-of-origin and location of the assignment, assigned expatriates can be PCNs, HCNs or TCNs. Some alternative forms for developing global skills or conducting global businesses have been identified as well, namely short time assignments, flexpatriation and international business travels.

The chapter also dicusses the wide variety of different roles and work tasks that such relocation specialists may perform **(Table 2.)**. It can be position filling, management or organizational development. Another classification distinguishes corporate agency, problem solving, competence development and building experience. As some researchers argue expatriates are tools for control and coordination, while taking the subforms of Bear, Bumble Bee or Spider. Trust is also found to be a main reason behind the use of expatriates. Alternatively, it is suggested that international assignments can be viewed as a knowledge transfer mechanism.

Table 2. Summary of expatriate roles (Own compilation).

Author (year)	Roles
Edström & Galbraith (1977)	position filling management development organizational development
Pucik (2011)	corporate agency problem solving competence development building experience
Harvey & Moeller (2009)	control coordination
Brewster & Scullion (1997)	lack of availability of management and technical skills control maintain trust management development
*Harzing (2001)	Bear (i.e. top-down control) Bumble Bee (i.e. lateral coordination) Spider (i.e. smooth communication)
Hays (1974)	structure reproducer technical troubleshooter operational expatriate chief executive officer
Bonache & Brewster (2001)	knowledge transfer mechanism

Considering the classification of Harzing (2001) as a subcategory within the role of 'control and coordination', it can be stated that all six classifications have some

common ground, i.e. definite end-goal. Although many assignments combine some of the elements, in most cases it is clear which of the roles dominates (Evans et al. 2011: 140).

All in all, regardless of the assigned role, those who go through a career including various international assignments in multiple countries over the course of their working lives have extensive developmental opportunities, meanwhile there is chance for developing the most detailed understanding of the global business environment and acquire globally applicable skills (Jokinen et al. 2008: 982).

After discussing the phenomenon of expatriation including its definition, categories and argument behind its use, the second main theory is presented. As stated before such relocation specialists have global mindset and more clear-cut understanding of doing business globally. They can be a form of competitive advantage, if they perform well and contribute to organizational goals in the new environment.

3. GLOBAL PERFORMANCE MANAGEMENT

Performance management of international assignees is a critical HRM process that can facilitate (or hinder) global integration by linking local business goals and appraisal to global objectives and standards. Performance management can also be a tool for lateral coordination across the different business units. (Evans et al. 2011: 150).

Chapter two focuses on expatriates' performance in the host environment. Firstly, it examines it as a process consisting of four stages in order to gain a deeper understanding what really happens in the foreign environment, what actions take place in the different stages. Then, several determining factors are identified and analyzed to see how and why performance in the host country can be success or failure. The last part of the chapter discusses time and the degree of adjustment, as an important reference point in determining performance outcome.

3.1. Performance as a process

Lazarova, Westman and Shaffer (2010: 95) view expatriate performance as a fourstage process consisting of cognitive, affective, conative, and behavioral components **(Figure 2.)**. Drawing on Job Demands-Resources (JD-R) theory and contagion theory, in their research they aimed to clarify the process by which expatriates perform their roles as employees and as spouses/partners.

The theory of contagion or 'spill-over' (Wurtz & Suutari 2015: 802) refers to the process of transference of moods, behaviors and the like between two bi-directional domains, namely the professional and the private. If such impacts are positive they generate enrichment, while in case of being negative conflicts and pressure appear.
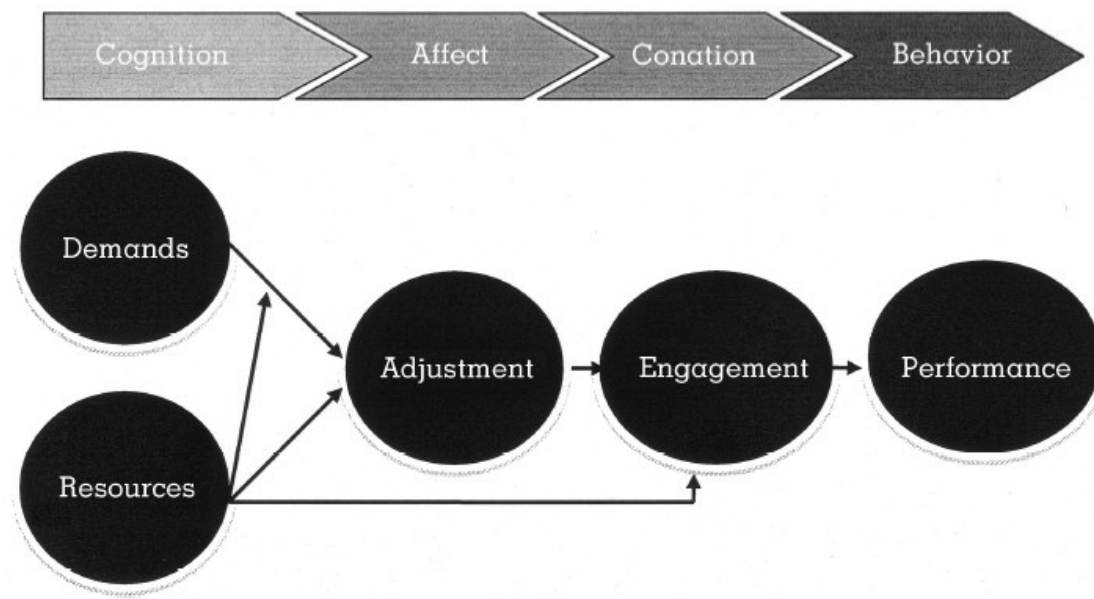
Figure 2. A model of expatriate performance (Lazarova et al. 2010: 95).

In the process the different model components build on each other. Cognition is the process of acquiring knowledge and understanding about an event or experience, meanwhile affect is the emotional response to an individual's cognitions. The third element, i.e. conation, is the striving element of motivation, and connects cognitions and affect to behavior. (Lazarova et al. 2010).

Applying the four stages to international assignments cognition refers to job/family/ foreign environment-related demands and resources. Demands are stressors, while resources are responses to such demands and tools to reduce stressors, achieve goals, and stimulate personal growth and development. Resources, such as time and energy, are restricted, and overload may cause stress (Mäkälä, Suutari & Brewster 2014: 228). Affect refers to the degree of a person's psychological comfort with various aspects of a new setting, i.e. expatriate adjustment, including foreign culture, work and family adjustment. Conation is represented by engagement in which high involvement, energy, and self-presence in various roles are all embedded. Behavior and especially participation in a particular role, regardless of work or family role, reflect on the

achievement of obligations and expectations, which at the end all relate to the individual's performance. (Lazarova et al. 2010).

3.2. Performance determinants

Several authors have attempted to identify performance determining factors underlying international assignee success (Winfred & Winston 1985: 101). Jokinen et al. (2008: 982) state that international work may lead to higher demands on the capabilities of individuals, while Evans et al (2011) suggest they better fit current global market demands than employees without such skills, knowledge and experience.

First of all, there is need to define some basic terms. Knowledge, skills and abilities (KSAs) are three different things, but are often used interchangeably. Knowledge refers to the theoretical or practical understanding of a certain subject, meanwhile skills are the proficiencies developed through training or experience, thus usually mean something that has been learned. Skills can be developed through knowledge transfer. Abilities are the qualities of being able to do something, talent in a particular area. There is a fine line between skills and abilities: skills are learnt, abilities are innate. (Concise Oxford English Dictionary 2002).

After clarifying the basic terms, findings of researchers and practitioners are discussed on different, yet generally agreed KSAs as determinants of success or failure on the job, which serve as a base for durther comparison and analysis. Classifications are presented in the order of encountering upon conducting the research. Results are further illustrated in **Appendix 3.**

1.) Tung (1981: 69) identifies four groups of variables that contribute to expatriate success, namely technical competence in the job, personality traits or relational abilities, environmental variables, and family situation. She suggests that besides such factors the relationship between these variables and the weights should be identified as well.

2.) The findings of Evans et al. (2011: 143) are quite similar, they found characteristics of successful expatriates as professional and technical competence, relationship and communication abilities, cultural sensitivity and flexibility, self-efficacy and tolerance for ambiguity, and lastly, family factors.

3.) Given the previously mentioned knowledge transfer mechanism role suggested by Bonache and Brewster (2001: 161), in their ranking technical qualifications take the first place, reasoning with the nature of knowledge why, in the selection of expatriates, the emphasis is on technical qualifications. They claim that if the fundamental reason for using expatriates is to transfer the capabilities that provide the company with a strategic advantage over its competitors, then the basic recruiting criterion will have to be possession of these capabilities.

4.) Mendenhall and Oddou (1985: 39) argue that technical expertise and domestic track record are by far the two dominant selection criteria, meanwhile language skills and international adaptability are on their list as well, but less importance is attributed to such variables.

5.) To enhance Intercultural Effectiveness, Hannigan (1990: 90) provides a list of several skills and abilities that an expatriate should possess, including the ability to communicate, ability to establish and maintain relationships, interaction management, orientation to knowledge, world view, cultural empathy, linguistic ability, flexibility, a realistic view of the host culture and organization skills. He also lists factors that have a negative correlation, including dependent anxiety, task-related behavior, authoritarianism, perfectionism, rigidity, ethnocentrism, narrow-mindedness, and self-centered role behaviors.

6.) Although in Stone's (1991: 10) findings technical competence stands as the key selection factor, he also emphasizes that ability to adapt to foreign environment is a prime cause of failure. He highlights that, regardless of technical skills, people should be able to adopt readily to differences and also underlines the role of spouse and the importance of her adjustment to the success of the assignment.

7.) Upon examining the relationships between expatriate managers' satisfaction and commitment to their companies and assignments, Yavas and Bodur (1999: 266) find that cultural sensitivity, empathy, willingness to take assignment and cultural preparedness undoubtedly reflect an expatriate's ability and willingness to alter his/her attitudes and behavior to adjust to the local conditions.

8.) Shaffer, Harrison, Gregersen, Black & Ferzandi (2006: 109) build their model on stable personality traits (the Big Five in **Table 5.)** and specific behavioral competencies (cultural flexibility, task and people orientations, and ethnocentrism) on key dimensions of expatriate effectiveness: psychological adjustment, assignment withdrawal cognitions, and job performance.

9.) Based on their multinationally diverse sample, Arthur and Bennett (1985: 99) identified the following five factors that are important for success: family situation, flexibility/ adaptibility, job knowledge and motivation, relational skills, and extra-cultural openness.

10.) Deploying the Delphi method four categories were identified by Adler (1983: 37), as skills and abilities most necessary for managing in a multicultural organization: professional and managerial skills, personal and social skills, cross-cultural and international skills, and spouse and family qualities.

The ten authors' classifications on the large number of factors that are considered vital for successful expatriation are summarized in **Table 3.**. Attempting to combine all these characteristics, the number of ideal candidates would be close to zero. Although, some overlaps can be found among them, meaning that certain characteristics are agreed as must-have, but their degree is situation-dependent.

Table 3. Summary of performance determinants (Own compilation).

	technical competence	relations, communication	environment, culture	family	sensitivity, flexibility	experience	language skills
Tung (1981)	X	X	X	X			
Evans et al. (2011)	X	X		X	X		
Bonache & Brewster (2001)	X						
Mendenhall & Oddou (1985)	X		X			X	X
Hannigan (1990)	X	X	X		X		X
Stone (1991)			X	X	X		
Yavas & Bodur (1999)			X		X		
Shaffer et al. (2006)		X	X		X		
Arthur & Bennett (1985)	X	X	X	X	X		
Adler (1983)	X	X	X	X			
SUM	7	6	8	5	6	1	2

Analyzing the summary table it can be noted that 'professional or technical competence on the job' is explicitly present in the work of seven authors out of ten, which highlights the importance of job knowledge. The second most dominant factor, based on these findings, is relational and communication skills, claiming that it is necessary to build and maintain close interpersonal contacts that are beneficial for successful work performance. Since all international assignment is cultural-related, some form of cultural preparedness and openness, in parallel with flexibility and/or empathy is needed to understand and accept the differences between countries and situations (Evans et al. 2011: 143). The role of the family can also determine the outcome of the international assignment, so right from preparation for the assignment they should be involved as well. In addition to facing job-related challenges and the new work role in the foreign environment, expatriates need to adjust to new family roles and responsibilities as well, including the changing dynamics of relationships within the family unit (Lazarova et al. 2010: 93).

As seen, the range of recommended skills and abilities goes beyond those necessary to succeed in a domestic environment. It is proposed that international assignees should have all the skills requisite for domestic management, plus those cross-cultural and international skills that make for effectiveness in geographically dispersed, multicultural work environments. (Adler 1983: 41-43).

The chapter started with the statement that performance management of international assignees is a critical HRM process that can facilitate (or hinder) global integration. However, companies can do a lot in order to enhance expatriates' success and their general well-being. For instance, Clawson (2005: 34) suggests seven ways of making an international assignment as productive as possible. By applying the suggested golden rules (**Table 4.)** and managing wisely the expatriate process, the HR department can foster the desired performance outcome of any expatriate, and hence ensure positive impact on the organization, i.e. global integration.

Table 4. Clawson's golden rules (2005: 34).

1. Pick the right people.
2. Give assignees suitable preparation.
3. Consider the implications of a foreign posting for the employee's contract.
4. Apply consistent appraisal and performance management standards across the organization.
5. Respect local differences.
6. Maintain old networks and build new teams.
7. Warn expats in good time when a repatriation is imminent and prepare them for upheaval.

Clawson's guidelines build on the HRM process (Harvey & Moeller 2009). Picking the right people refers to the identification/ selection step, by making great effort to find the most appropriate candidates. Suitable preparation includes both personal and

professional training and development, and involvement of the accompanying family as well, when applies. Rules 3, 4 and 5 relate to the compensation, reward and performance management of the expatriate, meanwhile networking and preparation for returning to the home country lead to the issues of succession planning and repatriation.

3.3. Possible performance outcomes

So far Chapter 3 has been analyzing what happens during the four stages of expatriate performance and also identified several factors that influence adjustment, engagement and therefore, the whole performance outcome. Based on such theories, success and failure are discussed next.

A successful outcome for the company is not easily established, may include a number of elements and, therefore, is not easily measured. Assignment outcomes may vary from the view of the organization, their co-workers and their families, thus the results of any such analysis may be quite different from the assessment of the expatriates themselves. Additionally, opinions on the success of the expatriation may change over time: what seemed to be a more successful or a less successful assignment during or immediately, after it may be seen differently with the benefit of hindsight. (Brewster, Bonache, Cerdin & Suutari 2014: 1922).

3.3.1. Success

The assessment of expatriate performance requires an understanding of all the variables that influence an expatriate's success or failure in a foreign assignment. It has been argued that the three major variables include the environment (culture), job requirements and personality characteristics of the individual (Schuler, Fulkerson & Dowling 1991: 368). The latter two dimensions can be found while performing within the borders of the home country, while according to Brewster and Bonache (1997: 34) problems in cultural adjustment, which may have an impact on work performance,

should be considered when assessing an expatriate's performance and speed with which an expatriate masters a new job in a foreign environment.

Claus, Lungu and Bhattacharjee (2011: 250) base their framework on three streams of research regarding expatriate performance management; individual, organizational and societal levels are examined separately. The individual (micro) level focuses on personality and personal characteristics of international assignees. The organizational level focuses on organizational contextual characteristics and human resource (HR) processes, while the third stream focuses on the societal (macro level) and the much broader cultural and institutional context of expatriate performance management. Present study is limited to the analysis solely of the individual level.

Most research focuses on 'expatriate success', which is often defined in terms of expatriate adjustment, commitment, job performance, and intentions to complete the assignment (Kraimer & Wayne 2004: 209). Caligiuri and Day (2000: 155) argue that the performance construct has been oversimplified to an assessment of overall performance, and that performance should rather be viewed as a multidimensional construct.

Evans et al. (2011: 142) suggest that expatriates' performance to be measured based on dimensions such as time to proficiency, the time that it takes to master a new role, or indeed assessments of overall job performance. They also note that intercultural adjustment and expatriate work performance should include elements such as adjustment to work, to the general environment abroad, and to interaction with the local environment (Hechanova, Beehr & Christiansen 2003: 215; Evans et al. 2011: 162).

According to Harrison and Shaffer (2005: 1454) expatriate performance is conceptualized based on three dimensions: task completion, relationship building and overall performance (**Figure 3.)**. It is stated that fulfilling specific task requirements and developing and maintaining relationships with host-country nationals are both core facets of expatriate performance and are fairly consistent with the task's technical and interpersonal facilitation. Task completion involves attaining specific goals or getting

definable projects accomplished, while relationship building involves developing or maintaining interpersonal ties with members of the host country workplace. Thus, adjustment is viewed as affecting other work-related outcomes such as strain, job satisfaction, organisational commitment, performance, and turnover intent (Hechanova et al. 2003: 215).
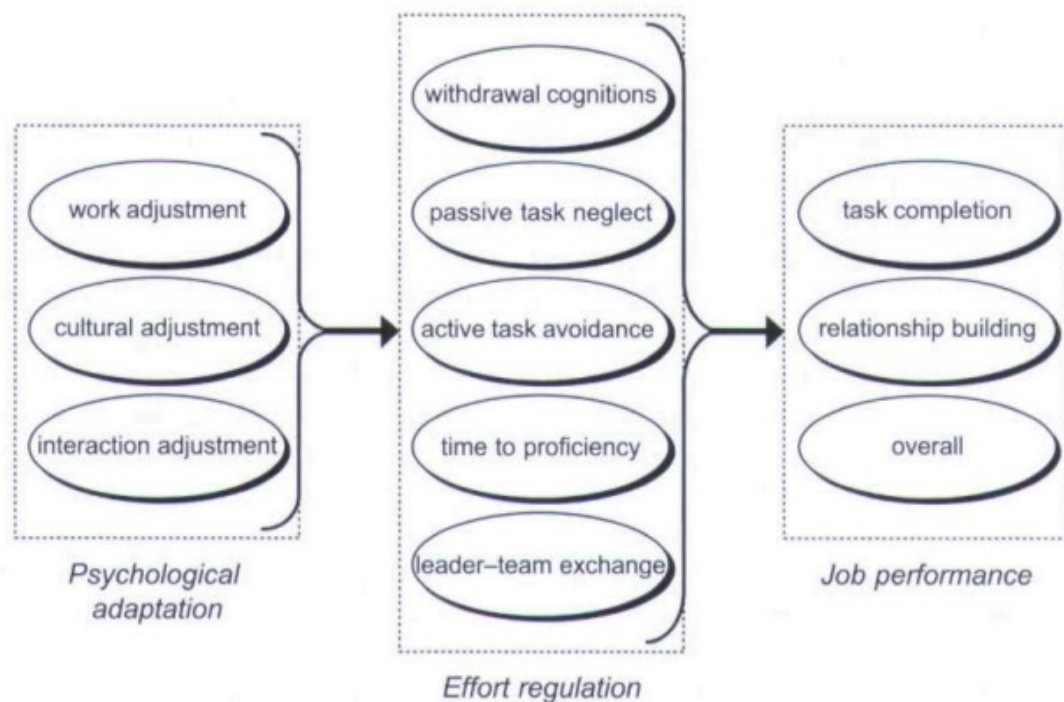
Figure 3. Adjustment-effort-performance linkages (Harrison & Shaffer 2005: 1454).

Caligiuri and Tarique (2005: 3), upon conducting their research on international assignees' success at individual level, found that successful and well-adjusted international assignees tend to share certain personality traits **(Table 5.)**. Extroversion, agreeableness, conscientiousness, emotional stability, and openness or intellect, collectively constitute „the Big Five", and each personality characteristic has some relationship to international assignee success. Previously discussed model of Shaffer et

al. (2006: 109) is also built on stable personality traits, meaning that the performance outcome of an international assignment is partly coded in the individual itself.

Table 5. The Big Five personality traits (Own compilation).

Personality	Importance
extroversion	helps to learn the work and non-work social culture in the host country
agreeableness	deal with conflict collaboratively, strive for mutual understanding
conscientiousness	more likely to become leaders, gain status, get promoted, earn higher salaries, predictor of effective performance
emotional stability	cope with living and working stress in the new environment
openness, intellect	correctly assess social environment with its ambiguous social cues

These personality traits are important for international assignees' adjustment to the foreign environment and completion of an international assignment. However, the necessary level of each characteristic depends on the nature of assignment. Some classifications in **Table 2**., for instance Arthur and Bennett (1985: 99), contain certain factors that are clearly personality-type characteristics and preliminary evidence for the relationship between personality and expatriate success (Caligiuri 2000: 68).

3.3.2. Failure

Meeting a different way of life than in their own country, expatriates have to perform in an unfamiliar work context. It could be a stressful experience to try to adjust to the new cultural environment and not everyone is successful at that (Selmer 1999: 78). A simple definition by Forster (1997: 414) states that failure can be interpreted as level of performance below expectations. Although, to reach a more exact definition and gain a deeper understanding behind the complexity of the performance outcome, more influencing factors need to be considered.

Assessing expatriate failure based on the single measure of early return/recall is far too simplistic and misleading. There are more appropriate measures than simply premature return. As suggested by Hung-Wen (2007: 403) the definition should consider measures including underperformance, repatriation difficulties and undervalued skills and knowledge of repatriates by the parent company. His empirical findings identify the role of home company as significant contributor toward expatriate failure and ranks it as the third most important failure factor (2007: 411). Clawson (2005: 34) supports the importance of regular contacts with home and host country, staying visible and active with old email groups, and the use of common performance management guidelines.

Alternatively, some researchers (Brewster 1977: 32; Toh & DeNisi 2005: 132; Hung-Wen 2007: 405) suggest that failure can be measured via indirect costs, such as loss of market share, damage to overseas relationships with customers, suppliers, and host government officials, discredited corporate image, and reduced productivity that may be meaningful as well. Considering such potential costs, it is of high importance to manage international assignments effectively.

The US National Trade Council found that failure to adjust to the foreign cultural environment is a key reason for expatriate failure. The potential to facilitate adjustment lies in the local or host country staff with whom the expatriates work closely while on assignment. Many MNCs tend to overlook the possible issue of lack of local support. Local staff could be an expatriate's best on-site trainers, but could also seriously

jeopardize the international assignees' ability to carry out the given assignment. (Toh & DeNisi 2005: 133; Clawson 2005: 34).

A more sophisticated and comprehensive understanding of the concept of expatriate failure is presented and a five-category classification is suggested by Harzing and Christensen (2004: 616-619). The first category defines expatriate failure as ending the international assignment before the contract expires, while in the second column assignment ends prematurely, but additionally, all of them link the premature return to one or more reasons for the outcome. The third column refers to expatriates who are underperforming. In this case the expatriate faces or causes problems to the organisation, but the consequence is not a premature end to the assignment, it is assumed that the contract period is fulfilled. Category four and five relate to the time after the international assignment has ended (regardless of the cause), and deal with the end of the employment contract after repatriation or repatriation problems.

In the model of Hechanova et al. (2003: 216) the tripartite definition of adjustment is the starting point as well as in the studies of Harrison and Shaffer (2005: 1454), and Bhaskar-Shinivas, Harrison, Shaffer and Luk (2005: 257) **(Figure 4.)**.
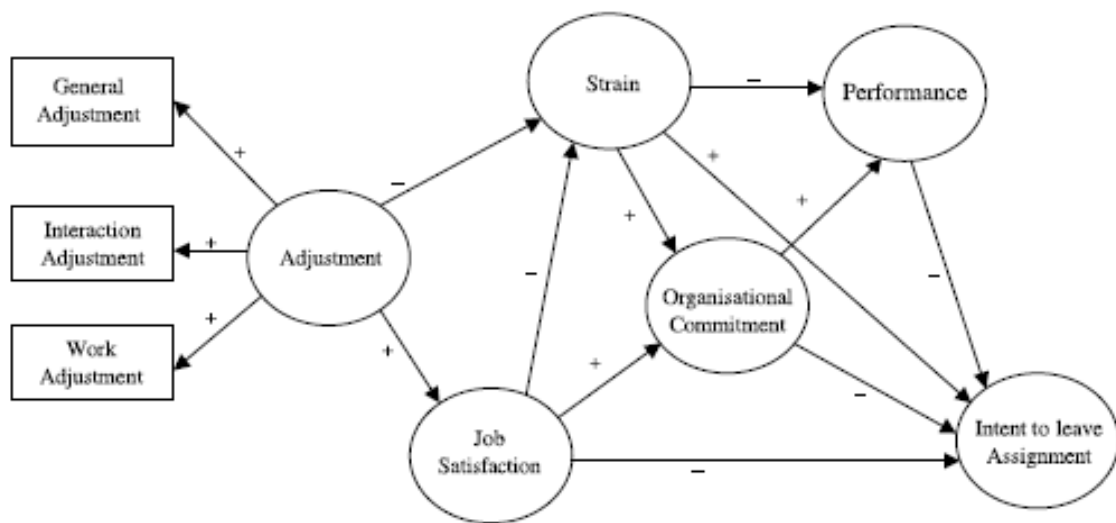
Figure 4. A model of expatriate outcomes (Hechanova et al. 2003: 216).

As the figure indicates adjustment may improve job satisfaction, meanwhile negative adjustment may cause strain, which can be either beneficial or harmful. Positive job satisfaction further leads to greater organizational commitment, which can result in the desired level of performance. Negative job satisfaction or weak organizational commitment may create an intent in the expatriate to leave and terminate the assignment. Additionally, it has been proposed that strain may lead to poor performance and to turnover intent as well. Therefore, depending on which way the expatriate's personal arrow goes success or failure can be the stated outcome.

3.4. Importance of time

The model of expatriate performance (Lazarova et al 2010) and of expatriate outcomes (Hechanova et al 2003) both contain adjustment as an important element, which is the process of adapting or becoming used to a new situation (Concise Oxford Dictionary 2012). When an expatriate is transferred from one country to another some issues arise deriving from liability of foreignness. At the beginning of their assignments most expatriates do not know how to appropriately and effectively behave in the host culture.

Black and Mendenhall (1991: 225) refer to this time lag as a period of learning about the country's business and social norms, which is necessary before any personal and job productivity can occur. Thus, the adjustment of expatriates to the host country culture can be drafted as a function of time (**Figure 5.)**.

Degree of Adjustment
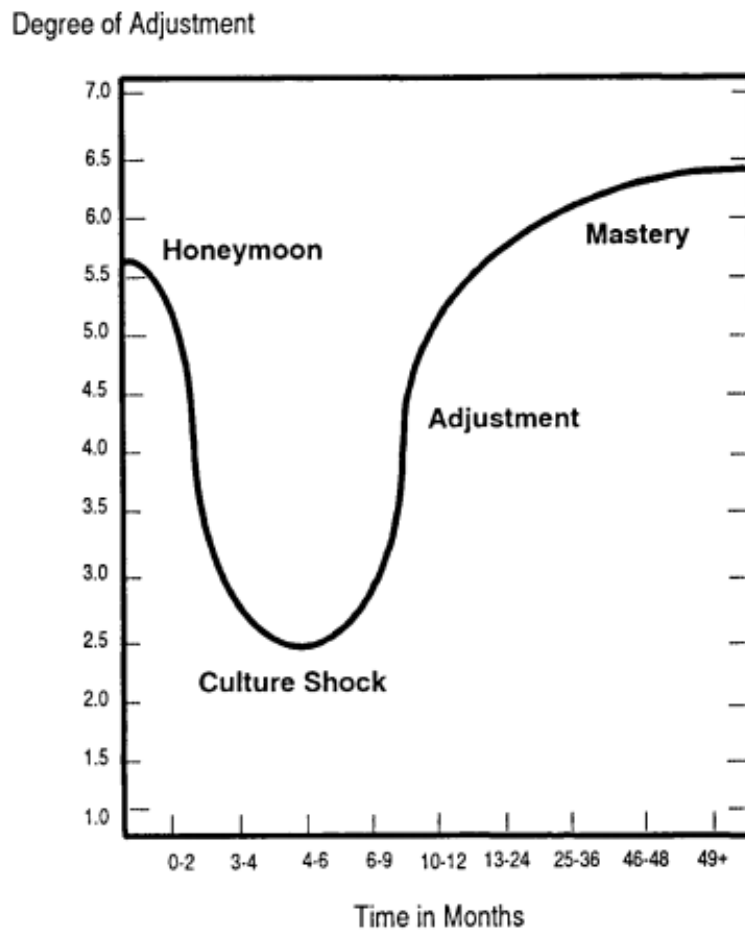
Figure 5. Adjustment as a function of time (Black and Mendenhall 1991: 225).

The U-curve theory (UCT) identifies four stages through which the individual gradually adjusts to the foreign culture (Usunier 1998: 93). Theory suggests that the first stage, honeymoon is the time when individuals are fascinated by the new culture and are excited about all that is new and interesting. After spending about three months in the new environment, in stage two, the individual finds disillusionment and feels frustrated

and annoyed, while simultaneously deals with every-day challenges. This is the most challenging stage, and depending on how individuals are coded some give up on achieving final goals earlier and consider returning, while others prefer to cope with problems and consider them as possibility to grow, both personally and professionally. The adjustment stage presupposes gradual adaptation to the changed environment, and by this time the individual learns how to appropriately and effectively behave in the host culture. According to UCT the highest degree of adaptation, i.e. mastery, can be reached after about two years, when by small incremental changes the individual increases his/her ability to function effectively in the new enviroment. (Black & Mendenhall 1991).

During their international assignments expatriates experience different feelings through the process of adjusting to the new environment, in which the importance of time is notable. Clearly, this theory does not apply to each individual to the same extent, as there might be delays regarding the appearance, duration and impact of the different stages. However, it can support why some individuals and their families might not perform as expected, and can provide explanation on why an individual might consider an assignment as a success at some point, while as a failure at some other.

3.5. Summary

Expatriates are very costly and difficult to manage, and thus it is difficult to measure their contribution or value (Bonache & Brewster 2001: 160). Although research had proved that the practise of operating with „domestic equals overseas performance" equation is outdated (Brewster & Scullion 1977: 33), no generally accepted practise is known for evaluating their performance. Clearly, managing global employees is more complex and challenging than of domestic jobs and experiences (Brewster et al. 2014: 1926).

Chapter three of the thesis deals with expatriate's performance and the different aspects that can be attributed to it. Firstly, drawing on Job Demands-Resources (JD-R) theory

and contagion theory, it is examined as a fourstage process of cognitive, affective, conative, and behavioral components (Lazarova et al. 2010: 95). Secondly, some performance affecting determinants are identified that are underlying international assignee success, such as technical competence, environment and family. Classifications of ten authors are compared and analyzed with the use of a visual tool. Thirdly, the chapter discusses the concepts of expatriate success and failure based on the three major variables (environment/culture, job requirements and personality characteristics of the individual) as the two possible outcomes of any international assignment. Lastly, the chapter identifies the four stages presented in the UCT, a theory which highlights the importance of time in an international assignee' and his/her family's lives, and could be a reasoning behind an individual's self-evaluation on performance.

4. DATA AND METHODOLOGY

4.1. Research design

Predominantly, there are two types of research, qualitative and quantitative approach. Present study is an example of multi-method research design, where both qualitative and quantitative approaches were used **(Table 6)**. Given that the aim of the empirical part is "*to capture lived experiences of the social world and the meanings/interpretations people give to these experiences from their own perspective*" qualitative research was conducted (Liamputtong, 2010: 11). This type of methodology is appropriate since it is an exploratory description, with targeting the microlevel, i.e. global employee within the organization rather than the global work itself, so as to understand the individual's characteristics, personal experiences, attitudes and behaviors (Shaffer et al. 2012: 1299). Additionally, it was aimed to explore the issues as an external party to the process and unpack the research question through the discussions (Maylor & Blackmon, 2005: 221). Therefore, the level of personal involvement with the subjects of the investigation was quite high. The underlying logic of ethnographic research approach is inductive: the empirical part was conducted in order to generate theory through pattern analysis (Maylor & Blackmon 2005: 153).

According to Maylor and Blackmon (2005: 257) different methods are especially likely to result in different answers when asking sensitive questions. People will often give the answers they think are socially appropriate in face-to-face interviews, but they are slightly more likely to be honest in anonymous surveys. Being driven by this fact the creation of the online survey, as quantitative research tool, was justified in order to have more chance in finding a more reliable set of answers.

Table 6. Research design and data collection (Own compilation).

Research design & data collection	
1.) Qualitative	$N_i = n_p + n_e$
Personal interviews (n_p)	8
Electronic interviews (n_e)	8
	$N_i = 16$
2.) Quantitative	
Online survey	**$N_s = 43$**

4.2. Data collection

Data were collected via one-on-one personal interviews ($n_p = 8$) and electronic responses ($n_e = 8$), by using identical interview questions **(Appendix 4.)**. The second mode of data collection was applied to reach a larger sample group and improve generalizability. Additionally, considering time and geographic differences, some flexibility had to be demonstrated to save time and cost for both interviewer and interviewee. During the personal interviews semi-structured interviews were conducted, asking half-prepared questions that defined a certain outline of the topics/themes, while the use of open-ended ones showed some flexibility. In the latter case more speech from the side of the interviewee was encouraged and some topics were also discussed that were not previously considered (Eriksson & Kovalainen 2008: 82). The given flexibility allowed the interviewee to change discussion direction and examine different thoughts and feelings, but at the same time the interviewer had the possibility to guide the interviewee back to the main topic in case of digression (Saunders, Lewis & Thornhill 2003).

The interviews were started with the individual and company background details, such as nationaly, level of education, position within a company, host countries and length of stay. After the general warmup questions, the research-related ones followed with the

most important ones at the beginning just in case the candidate really gets into deep story-telling and we run out of time. This part of the interview was structured around the performance affecting factors that were specified in the theory section. Storytelling and experience sharing were encouraged by the questions and by asking for further explanation or examples. At the end 2-3 open-ended questions closed the interview, in which the expatriate could suggest more in-depth and lengthier responses and potential ideas that could be worth considering for expatriates-to-be.

As the second part of the interview respondents were asked to fill out an online survey, in which they had to evaluate on a 1-5 Likert scale some prelisted skills and abilities (**Appendix 5.)**. Some skills and abilities, for instance 'willingness to change' and 'family support', were chosen based on theory, while some others randomly, for example 'creativity and imagination', to test the audience. This provided a chance for interviewed respondents to reflect on some KSAs that they might consider important as well, but did not mention in person. 43 responses came for the online survey, which is more than the number of interviewees ($N_i= 16$). It was also sent out to a bigger group of expatriates, and at the same time posted in selected social forums, with a short explanation. To ensure quality responses the message explicitely said that is should be filled out by those who have lived and worked abroad before, and via the background questions reliability had to be confirmed by stating job position and number of previous assignments.

Each interview lasted for approximately 30 - 90 minutes. Where permission was granted, interviews were recorded and subsequently transcribed word for word to enhance maximum accuracy and enable researcher to focus on the quality of responses, rather than on taking notes (Maylor & Blackmon 2005: 232). As all recorded interview subjects asked to remain anonymous and not to distribute any information to outsiders, interview transcripts are not enclosed. Data collection started in mid-June. Not having previous experience in interviewing, there was need to pilot test the interview guide and to make minor alterations, in order to increase the percentage of useful answers and be more oriented towards the research objectives.

In selecting samples nonprobability sampling was employed: in finding interview subjects convenience sampling, meanwhile for the online survey volunteer sampling were applied (Maylor & Blackmon 2005: 196- 197). Interviews were done with people to whom access could be gained, both assigned expatriates and self-initiated expatriates (N_i= 16). The pre-selected assigned expatriates work for MNCs, but spend or used to spend more time on business trips than at their offices. Self-initiated expatriates were interviewed so as to make the sample size bigger and findings more reliable. In case of not enough samples the method of Snowball sampling would have been applied: asking interviewees if they have contacts who possess such experience and would participate in an interview. However, some reservations were held that snowball sampling may be biased by their starting points and by dynamics, where respondents nominate further respondents from the same general group (Inkson & Myers 2003: 173). The online survey was filled out partly by the interviewed respondents, but at the same time it was announced via some online platforms as well, where viewers having previous experience in living and working abroad were asked to devote some of their time to fill out the survey.

4.3. Data analysis

The idea behind data analysis is to produce a systematic and convincing interpretation of the phenomenon under study (Maylor & Blackmon 2005: 154). After having the research material in textual form, such as transcribed interviews, emailed responses and survey results, as an outcome, a very extensive qualitative database was achieved. In total, approximately 110 pages of word-by-word transcripts of the interviews were available for analysis, which was started by collecting comments from the interviews, theme by theme. After that, the material was content-analyzed in order to identify common themes appearing from the data. After the identification of the key themes related to research question and objectives, data were classified under these common themes, which led to the final, thematic analysis placed in the Findings section. Here, besides the presented key themes, simultaneously, direct quotations from the interviews

are given (in italics) in order to describe the type of evidence behind the conclusions. (Riusala & Suutari 2004: 754).

4.4. Research quality

The quality of the research project is usually evaluated through concepts of validity and reliability (Riusala & Suutari 2004: 754), which in turn determine the creditability of the study referring to the confidence of the truth value of the research outcomes (Newman & Benz 1998).

In the present thesis validity and reliability were demonstrated through data collection and analysis processes (Saunders et al. 2009). In practise, it means that the researcher had to take steps to ensure that the data collected and analyzed was conducted with the ability (re: to measure what they were intended to measure, and whether they are enough responses to justify findings) to fulfil the criterion of validity, meanwhile testing that results are repeatable (re: other researcher gets the same findings if the study is to be repeated) to achieve reliability (Maylor and Blackmon 2005: 381).

4.4.1. Validity

Validity, or the degree of accuracy with which the research was conducted (Maylor & Blackmon, 2005: 158), was achieved by discussing the same issues from a variety of angles to ensure both parties have the same understanding of a given question and answer. Construct and internal validity was achieved by initial confirmation from respondents that 1) they fall within the category of expatriation, and 2) interview questions address all the important issues. The first interview was considered as a pilot interview in order to test whether the wording of the questions and the responses would generate the desired outcomes and answer the research question. Some alterations were needed, but on the whole the questionnaire deemed to be appropriate.

Through credibility validity was aimed to be supported by direct quoting from respondents. Key statements were used to support arguments that were developed during the interviews. Furthermore, interviewees were pre-informed about the goal of the research, and as first part of the interview they were told about the research objectives. These steps were taken in order to build trust and to ensure honest and reliable responses.

4.4.2. Reliability

Marshall and Rossmann (1999) state that situational changes do not allow qualitative research to be repeated in the exact same complex and dynamic circumstance in which it perviously occurred. However, reliability is achieved through avoiding research biases. Firstly, interview discussions were recorded and transcribed right after they were conducted to ensure transparency. Secondly, the avoidance of potential leading questions; reactions, comments, tone and behavior of the researcher were kept as neutral as possible to reduce questioning bias (Maylor & Blackmon 2005). Thirdly, all interviews started with confidentiality statement which encouraged respondents to be as specific in their answers as they can, and provide practical examples as well when helpful.

5. RESULTS AND FINDINGS

This chapter of the study reveals and categorizes the findings. Firstly, findings from the personal and emailed interviews (N_i= 16) are presented, and secondly the online survey results (N_s= 43) are described. After the separate presentations, results are compared. The chapter aslo aims to answer the research objectives; (1) to identify predominant reasons for expatriation success and failure, and by providing some explanation supported by direct quotations (2) to gain deeper understanding on the role of such factors.

5.1. Interviewed expatriates and their general characteristics

Related to the first discussed theory, expatriates, some general background statements are made first. Such overview of the respondents serves as a base for further discussion of the results and findings regarding the second discussed theory, as of chapter three.

Table 7. Background of respondents (Own compilation).

#	AE/SIE	Age	Gender	Nationality	Marital status	Job position	Number of assignments	Host countries	Type of interview
1	SIE	27	F	Hungarian	single	sales controller	multiple	France, Finland	personal
2	SIE	24	M	Hungarian	married	customer service	single	Finland	personal
3	SIE/AE	74/73	M/F	British/ Finnish	married	sales manager	multiple	Saudi Arabia, Germany, Nigeria	personal
4	SIE	27	M	Czech	single	sales manager	single	Finland	electronic
5	SIE	33	M	German	single	customer service	single	Finland	personal
6	SIE	31	M	Hungarian	single	product manager	single	Finland	personal
7	SIE	56	M	Hungarian	married	quality controller	single	Sweden	skype
8	AE	50	M	Hungarian	married	product manager	multiple	5 continents	electronic
9	AE	42	M	Hungarian	married	global supply manager	multiple	USA, Belgium, Switzerland	electronic
10	AE	33	M	British	married	product manager	multiple	Nigeria, USA, Finland	electronic
11	SIE	25	F	British	married	customer service	single	Finland	personal
12	AE	30	M	Hungarian	single	business advisor	single	Belgium	electronic
13	AE	52	M	American	married	product manager	single	Finland	electronic
14	AE	28	M	Hungarian	single	marketing manager	single	Brazil	electronic
15	AE	37	M	Hungarian	single	product manager	multiple	UK, Australia	electronic
16	SIE	27	F	Hungarian	married	customer service	single	Finland	personal

The age range of the interviewed expatriates is between 24 and 74, where the majority of respondents fall within the age group of 24-39 (n=11). In the sample 13 males and 3 females were included, only in one case both the expatriate and the accompanying spouse were interviewed, whose answers well complemented and justified that of the expatriate's. Due to convenient sampling most of the respondents were Hungarians (n= 10), but access to some other nationalities was gained as well, for example, 3 British, 1 German, 1 Czech and 1 American expatriate were among the respondents. In ten cases the interviewed expatriate was married, but is important to note that in half of the cases the expatriate established family in the new environment while being on assignment. Considering the distribution of age, it is of no surprise, that the majority of respondents (n= 10) are on their first assignment, having no previous international experience. Among the host countries Finland was mentioned the most (n= 9), followed by Saudi Arabia, Nigeria and Belgium (n= 2), meanwhile Sweden, Germany, Switzerland, Brazil,

USA, UK and Australia only once. Having 25 years of experience one expatriate did not give specific host country names, but provided answer as „*5 continents*". Above description is based on a summary table, which was drafted to facilitate comparison of characteristics of the respondents **(Table 7.)**.

As the last question of the warm up section interviewees were asked to specify and rate some skills and abilities that they think are most necessary for managing cross-cultural experience abroad. Then, in-depth and lengthier responses were provided for the open-ended questions with the aim to capture lived experiences of the social world and the meanings/interpretations of the respondents (Liamputtong 2010: 11). In the following section these findings are discussed in detail, aligned with direct quotations from the interviews (in italics) in order to describe the type of evidence behind the findings.

5.2. Performance-related findings

Following the background description of the respondents, the presentation and interpretation of the Findings from both the personal and electronic interviews are presented based on the number of mentions and discussions of each KSA **(Table 8)**.

Table 8. Mentioned KSAs and their frequencies (Own compilation).

Skill, knowledge, ability	Frequency
1.) family support	16
2.) adaptability/flexibility, willingness to change	10
3.) cross-cultural communication (including social skills and language skills)	8
4.) technical skills, job knowledge	2

(1) Expatriation involves more than just the individual (Mäkälä et al. 2014: 226). Speaking of necessary skills, knowledge and abilities to perform well in a foreign environment all respondents (n= 16) mentioned the intensive support of family and friends at some point. Even in cases where the expatriate did not have his/her own family (n= 6), support from the parents and siblings was considered very meaningful. Such support was demonstrated in different forms, for example, financially, emotionally or even physically. During the interview with the expatriate couple it was found that the actual initiator behind the change was the spouse herself:

> „I was a really good help. I have been a real gypsy in my life, ever since I was 3. I have been to Sweden, then I went to England, and well (sight) we needed a change.[…] I said to my husband I have seen this advert in The Times, and it was everything he had, it was just missing his name on the top (both wife and husband laughing). So I urged him to answer this advert, he did and he knew that he is gonna get it." (wife of Respondent 3, Finland)

The husband added:

> „She was very supportive, as you see. We would have never got out if she was behind."

Fueled by family support from home Respondent 13 could fully focus on his foreign assignment and work tasks in the new environment. Although he was missing his family, knowing of their support inspired him in every day and he could perform well.

> „Separation from family was a big problem for me as the 2 year opportunity came up quickly and not to force the children to change plans, I moved by myself to Finland for the first year. We used Skype to communicate daily, as they prepared for school in the morning we could talk. I traveled at least every 9 to 10 weeks back to USA for business and family time. But they did support the change and never made me feel bad about being apart, and actually they moved to Finland for the second year."
> (Respondent 13, Finland)

Regardless of the family accompanying the expatriate or waiting for him/her at the home country, a good amount of emotional support may be incentive to face everyday challenges.

> *„My family makes me forget about my bad day and cheers me up after a long day. This is the best time of the day, when I can be with my wife and daughter. We like to go and take a walk in the forest nearby, watch the squirrels and rabbits on the pathway, literally only 2 meters away from us.”*
> (Respondent 2, Finland)

Having a total experience of 25 years behind with the average stay of one month, one respondent was really praising the family and their adjustment to the new environment:

> *„Family enjoyed the new place. They had no fears, no troubles, no communication problems. Even when we were exploring the country they quickly adapted to all conditions. This gave me green light to carry on with the job.”* (Respondent 8, South Africa)

Connected to the importance of family emotional stability also seemed to be a decisive factor. This was demonstrated by the majority of interviewees (n= 13) mentioning homesickness and being far from countr-of-origin.

> *„Without family or partner with whom you can share your things I would probably not, I am quite positive that I would not, stay in Finland. That is maybe also a really big factor that I had somebody on my side, so I was not alone. I met him just around the time when I was thinking about giving up and returning. Probably, I missed close emotional support before that. And this somebody later became my husband (laughing).”* (Respondent 16, Finland)

Not having the family around may have a negative impact on the individual. In the case of Respondent 13, for example, communicating with the family gave enough strength to stay in the new environment and continue his work. On the other hand, one respondents biggest struggle was the isolation from her family. However, Skype, email or regular phone calls helped.

„My biggest difficulty was being away from family, friends, and the whole change. It was positive, but also the biggest struggle. Talking about it, being on skype sometimes made me feel better (laughing) and facebook, of course, helped. It helped in a sense that I felt connected and I am still part of their life, but at the same time, I missed the most they were going through things I used to do." (Respondent 11, Finland)

Most of the respondents (n= 15) had a stable emotional background, only in one case it was proved that the lack of such background negatively influence work output.

„There was a period when I wasn't feeling quite well. For family reasons, getting separated from my spouse and two kids was emotionally hard. Certainly, it had an impact on my work outcome. I tried to keep it to myself and separate work and life, but it was extremely hard." (Respondent 6, Finland)

Solution was found and shared on how to overcome such feeling and find peace and satisfaction in any place, other than the home country.

„ The other thing, which we have learnt through the various experiences is that it is very important, in some form or another, to have an anchor in your life. Anything. A club, a church, wherever you go and know the people is very important. Vital for everybody. That is the key, you need some form of an anchor." (Respondent 3, Finland)

Family support is really important in living and working abroad, regardless of the distance between the expatriate and the family. This was confirmed by respondents saying it either directly or referring to it in their responses. A well-balanced emotional background can drive the expatriates' adjustment, engagement and overall performance.

(2) Most interviewees (n= 10) mentioned adaptability/flexibility or willingness to change as an important factor in managing a successful life and work in the host environment. One could argue whether such terms can be used interchangeably. Based on their definitions (Concise Oxford Dictionary 2012), it was found that such abilities

can be discussed simultaneously. Adaptability is the quality of being able to adjust to new conditions, meanwhile flexibility refers to the willingness to change or compromise.

The personaly trait of 'curiosity and adventurousness' were mentioned several times during the interviews (n= 11), either directly or indirectly as most necessary for being successful in a foreign environment (n= 5), or motivating factor behind the move itself (n= 9), which serves as a proof for willingness to change. In three cases the reasons for mentioning were overlapping.

> „I need challenges to spice up my life. Living and working abroad is full of these challenges." (Respondent 4, Finland)

> „Such an experience boosts me up in every possible way, and I have been missing this feeling earlier." (Respondent 14, Brazil)

A strong desire to know or learn something (Concise Oxford Dictionary 2012) may also lead to faster adjustment, engagement and result in success. If an expatriate is committed, there is no obstacle that cannot be overcome.

Without the ability to react and adjust to new situations that a person is not familiar with in his/her domestic culture, fitting in could be problematic, as well as time and energy consuming. Expatriates' foreign assignment and work contribution is a process (Lazarova et al 2010), which starts with an initial state of being foreign. Liability of foreignness means that they are new in the environment and they are unfamiliar with the system and how things operate properly. Through cognition they acquire knowledge and understanding, and gradually start to feel comfortable regarding the new job and general environment and adapt to new tasks or roles. For example, the breadth of responsibilities is usually broader than on domestic tasks as expatriates often work in smaller foreign units, often in less developed contexts, and often at higher organizational levels than before the assignment (Mäkälä et al. 2014: 229). It was confirmed by a respondent talking about the wider job tasks, a case in which the use of mentoring greatly contributed to the expatriate's performance:

„At work the administrative system is much different, meaning that more is expected, but it was clear for the host company and they were tolerant. At first it was a bit frustrating that I had to do some tasks that earlier it was made by someone else, but within some months I have gradually learnt everything. You know, at my first company I had a colleague, and we sat down once a week for an hour to discuss questions and job-related issues, and the boss often came to check on me and make sure I was ok. This was really helpful." (Respondent 7, Sweden)

According to a respondent adaptability can be learnt and practised, by spending time with people from the host country.

„It always helps to spend your free time with local people. This provides you the opportunity to embrace some of their values and understand their way of thinking, the way of doing things, how they approach things in accordance with their business culture as well as culture itself." (Respondent 4, Finland)

In a foreign environment there are many new things that are unfamiliar for the expatriate. Such differences are not necessarily right or wrong, only different. In order to live a balanced life, one must show flexibility and adapt to such changes. Interview results show that all respondents managed to adapt to the new environment in some degree. Clearly, some were more adaptive, while others yet not reached the third stage of the UCT, i.e. mastery. Questioning the standards of everyday life may be harmful, as it deprives the individual from focusing on other sources of happiness and satisfaction.

Speaking of adaptability further culture-related factors also have an impact on the general well-being and, as an outcome, on the performance of the individual.

Professor Geert Hofstede (2015) defines culture as *„the collective mental programming of the human mind which distinguishes one group of people from another"*. This programming influences patterns of thinking which are reflected in the meaning people

attach to various aspects of life and which become crystallised in the institutions of a society.

In all respondents' discussion culture was always mentioned, either directly or indirectly. Speaking of differences regarding obligations, expectations and/or general behavior, customs, institutions, language, cuisine and weather; culture serves as a base for explanation and interpretation. It is worth noticing that speaking of feelings and opinions almost all respondents (n= 15) referred to their home country. In the exception case, respondent recognized this common reference/starting point and made the following statement:

> *„It is a common mistake that people often make. When you are cross-border, you must be open-minded and curious. Try to get to know the culture as soon as possible, and do not compare it with yours. Things are not better or worse here or there, only different..”* (Respondent 4, Finland)

Applying the theory proposed by Lazarova et al (2010) the role of culture is as follows: the new environment, including society and job as well, has certain expectations from the individuals, i.e. demands. Expatriates go abroad with certain skills, knowledge and abilities, i.e. resources. Aligning demands and resources some degree of adjustment may be reached, which creates engagement, and at the end drives performance. Adjustment, engagement and performance all depend on the individual, what he does himself. Although individuals vary in their perceptions, experiences and expectations (Welch et al. 2009: 1329), in order to achieve the best possible outcome, to be successful at work, one needs to have a clear and realistic view of the host culture.

> *„The atmosphere is good. I knew where I was coming, we (together with the family) have been visiting the place many times earlier. I knew what to expect culturally. I knew the flexibility and tolerance of locals, therefore I had a clear vision. The local company was very happy when I came here, as I had good references and professional background. Therefore, they gave me lots of responsibility. I felt good, like 8-8,5 on a 10 point scale (10 is the highest).”* (Respondent 7, Sweden)

A few respondents (n= 4) mentioned adapting to local cuisine and weather to be an issue. In some cases (n= 3) it did not result in negative work outcome and were easily overcame.

> *„At first I didn't like the lot of rain in the UK, but then I bought a good raincoat (laughing)."* (Respondent 15, UK)

On the other hand, in one case, there was a temporary halt in work activity:

> *„When I got sick, I felt really guilty. I came to work for the company and I was expected to work, but I wasn't able to do that. To some reason, when I first came, I got, because of the different climate and stuff, I got really sick quite often at the beginning until my body got used to the different bread and milk. That's how my body reacted. And I was sick for about two months."* (Respondent 11, Finland)

Working cross-border may mean different work atmosphere and work morale. For example, it can take the form of higher level or wider variety of work tasks, different allocation of working hours, or a less hierarchical structure.

> *„We have lot of breaks, not like in Hungary. We don't have to rush."* (Respondent 15, United Kingdom)

> *„In my work what I also learnt that what is written it can be questioned, or even changed. It was challenging to develop this kind of criticism. I think that trust is developed really really well, I definitely feel that anything can be discussed."* (Respondent 16, Finland)

Different work morale and time allocation also relate to the new environment, to which one needs to adjust. Certain types of tasks might require significantly more interaction with a local culture than others (Schuler et al. 1991: 369).

> *„My director requested more customer relationship time, than professional related activities. That was totally upside down, but slowly I accepted."* (Respondent 8, 5 continents)

Adjusting to the new environment starts with accepting the culture. Cultural differences may take many forms as seen above, for example, different weather, food or allocation of working tasks.

(3) The third most mentioned (n= 8) skill was cross-cultural communication, which includes (3a) social skills and (3b) language skills, at least in present study. Social skills refer to the personality of the expatriate that he/she is open to others, i.e. extrovert and outgoing. All expatriates need to have the ability to initiate contacts with other people. Otherwise they might feel uncertain and become more dependent on others. During the interview with a former expatriate and his spouse, the wife shared her experience:

> *„Particularly in this village in Germany, we moved there and nobody knew us, well some of them did because of church, but we used to start waving to people (laughing). When we came we just waved, and next time they waved back. Only one time did we ever hear a feedback, „Oh, they are the people who wave." You learn to get contacts. You got to do contacts."* (Respondent 3, Finland)

Finding an efficient way to successfully communicate with people of different cultural backgrounds, values, attitudes is vital as it can help to become more open-minded, humble and curious. Then the wife added:

> *„There was so much socializing. Every single night of the week we had invitation to a party, sometimes even two per night. During one month we had perhaps two free nights (laughing)."*

One respondent expressed his opinion by highlighting what happens if an expatriate lacks this skill:

> *„Well, you can live isolated, but then you hurt yourself. It is worth the potential bad days to have an experience that will have long lasting impact."* (Respondent 9, Switzerland)

The importance of having good social skills were also discussed in relation with treating people. A couple of managers (n= 2), working in customer service, highlighted that

putting themselves to the shoes of the client help to look at problems from different angles and be better at their work.

> *„Find the right tone with the people, treat them as they want to be treated. Talk to them in a way they feel comfortable."* (Respondent 5, Finland)

> *„I think that maybe one of the most important ability in such a multicultural environment, which I had to learn, and also because it comes partly from my personality as well, to like please people, but also do not want to hurt some like, you know, feelings. I think social skills are really important especially in this work (customer service), I meet so many different people with various cultural backgrounds."* (Respondent 16, Finland)

Communication is party about talking. Talking in a way that others understand you is especially important in the case of native speakers. For instance, the respondent of American nationality added:

> *„You will need to explain yourself more as others will not be accustomed to slang…"* (Respondent 13, Finland)

(3b) When it comes to communicating in a foreign environment the knowledge of local language must be discussed as well. Depending on the host country and the local language, English as the *lingua franca* might work well, but at the same time other cases have to be considered. Verbal communication happens partly via speaking, expressing feelings, opinions by words. If there is lack of knowing basic words in a certain language that is understandable by both parties, communication can be a disaster and result in failure. No matter how professional is an expatriate, if he/she cannot make himself/herself understood, the stated organizational goals might not be reached.

Therefore, in a foreign environment knowing the local language, regardless of the level, is beneficial. Paired with a good amount of professional skills, it helps to develop career- wise and be more satisfied with performance.

> *„At my present work I feel demotivated. I perform at an average level, I do what is expected, but not more. I feel I could make better use of my skills,*

knowledge and abilities. I used to be in higher positions, but now I am
downskilled. Opportunities are limited if you don't speak the language."
(Respondent 2, Finland)

Another respondent identifies the lack of language knowledge as his biggest problem:

„As for me most problems originate from my insufficient level of language
knowledge, especially when some administrative issues need to be taken
care of. Considering that I am not a native speaker, in many cases I had to
ask for help." (Respondent 7, Sweden)

It also helps to understand what is expected at work and communicate with colleagues, friends, a neighbor or anyone at the shop across language barriers, if they are respectful and tolerant. A couple of respondents (n= 2) expressed their annoyance regarding a specific culture, where colleagues at work do not treat them nice and continue the use of their own language, instead of finding a mutually understood one.

„Colleagues are cold and keep distance. They very much make you feel like
an outsider, I mean most of them, not everyone, of course. I can clearly tell
they do not accept me as I am an outsider, and they make me feel that, and
you feel. They communicate in Finnish, and I feel left out. Asking for
translation all the time is a hassle. And they tell all useful information like
that…" (Respondent 1, Finland)

Although the following example does not confirm this problem to a full extent, some similar opinion was expressed:

„As I did not speak Finnish, I was not always included in side
conversations. If I thought it was important, I would ask for an explanation,
tho." (Respondent 13, Finland)

Communication, therefore, is an important factor in one's life. As it is primarily used to exchange information the knowledge of a mutual language at least in a minimum level is meaningful in succeeding in a host environment. Such finding was supported by most of the respondents, based on their own experiences.

(4) Based on the previous literature review the role of technical skills and abilities was expected to be underlined. In fact, it was barely mentioned (n= 2) as most necessary skill for managing in a foreign environment. However, the degree of professional skills of the respondents did vary, but individuals discussing this skill confirmed that everything can be learned and must be learned anyway, due to the differences in work processes in the various cultures.

> „I have learnt many things during my assignment here. I learnt a new profession and did some work that I wasn't fully qualified for, regarding my educational background. You know, you don't necessarily need the right education for a job, but of course it's a plus to have." (Respondent 6, Finland)

Benefitting from broader responsibilities in the new environment one respondent expressed his success of professional growth:

> „All in all, I can say I became a more complex expert. I can do certain work tasks much easier." (Respondent 7, Sweden)

5.3. Findings from the online survey

As the second phase of the empirical part respondents were asked to rate 15 skills and abilities according to their importance on a 1-5 Likert scale **(Appendix 5.)**. It was followed by some general demographic questions to verify the quality of respondents and their answers. The survey was created by an online application and was open for a period of two weeks. After closing the survey 43 completed result fully completed sheets were available for further analysis. As the online tool provides some response summary, results and findings are primarily based on this basic statistical analysis, and secondarily on own observations **(Appendix 6-7.)**.

Following the same logic of describing the background of respondents first some general statements are made. Besides rating the listed skills and abilities, age, gender, family status, job role and number of previous international experiences were asked. The age of respondents was between 23-74, but most of them are in their late 20s - early 30s (n= 34). In the survey 26 females and 17 males participated, females representing 60,47% of the population, while males the remaining 39,53%. Family status varies, about half of the respondents (n= 20) said to be married, while the rest of the people were unmarried (n= 23), either single or in a relationship. Among the job roles were sales managers, finance managers, business managers, marketing managers and delivery coordinator, to mention a few. The number of previous international experiences was marked between 1 and 7, only in one case it was over 20.

Table 9. Online survey results (Own compilation).

Skill, knowledge, ability		Frequency (4+5)
Class 1	1.) communication skills	39
	2.) flexibility/ willingness to change	39/38
	3.) emotional stability	37
	4.) independence	37
Class 2	5.) Empathy, honesty, imagination	30
	6.) technical skills	29
	7.) international experience	28
Class 3	8.) knowledge of local language	21
	9.) family support	20

Survey results are categorized into three classes depending on their location on an imaginary scale. Class 1 KSAs, based on survey results, are considered vital in being successful in a foreign environment, with the highest frequencies of 38/39. Class 2 refers to KSAs in the middle range, with frequencies of 28-30. Regarding class 3 KSAs are relatively less important, than class 1 or 2. **(Table 9.)**

5.3.1. Class 1

Accumulating the results of 4s (important) and 5s (very important) communication skills and flexibility/willingness to change are proved to be the most necessary **(Table 9.)**. The weighted average value for these groups: communication skills 4,51, while 4,30 for flexibility. None of the respondents said communication skills is not so important or not at all, and only one respondent circled 'not so important' for flexibility. Most of the respondents (n= 38) think that 'willingness to change' is important to have as well. Respectively, the weighted average fall at 4,40. One respondent commented:

> *„Think out of the box, be open to new ideas, cultures and mentality, develop the ability to adapt in an unfamiliar environment."* (Junior recruiter, 3 previous experience)

Another respondent emphasized the role of change:

> *„A person should not be afraid of changes and adapting to them. The only constant thing is change."* (Product manager, 7 previous experience)

Further skills and abilities, with a higher than 4 weighted average, are emotional stability and independence. On the applied scale these values represent quite high importance, meanwhile rest of the skills and abilities (n= 9) are considered to have less importance or are situation-dependents.

5.3.2. Class 2

Empathy, honesty and imagination represent a group of abilities that are good to have, but are not proved as necessary as communication skills, for example. Being ranked as the eighth most important factor, technical skills and job knowledge is found to be important, however, its degree is dissonant. 29 respondents explicitly expressed its importance, 12 consider it situation-dependent, 2 people said it is not so important. There was no person questioning its relevance in the host environment.

Results show that having previous international experience is not the most or the least important factor, however, the expatriates and their families could utilize some learning points from previous assignments in the new assignments (Mäkälä et al 2014: 230). Out of the total number of respondents (n= 43), 11 consider it very important, 17 important. Although one respondent commented it can be beneficial to have:

> *„Previous international experience can be important as it help one to understand the need to understand and appreciate another culture and how it works."* (Business/legal advisor, 3 previous experience)

5.3.3. Class 3

With a weighted average of 3,49 the knowledge of local language is found to be the second least important factor for managing in a foreign environment. 9 people marked it 'very important', 12 people 'important', 15 people cannot decide and 7 consider it not important. One respondent noted:

> *„The foreign environment in which you work has a great influence. E.g. The degree to which a language you know (re: English) is mutually understood by co-workers."* (Delivery coordinator, 2 pervious experience)

Family support received the lowest weighted average, 3,35. Less than one third of the respondents (n= 11) think it is very important to have, 9 respondents say it is important,

12 individuals did not take a commitment, and based on the circled answers 11 people do not attribute much significance to their families. It is worth noting that such values do not mean family support is not important, but evidence shows that compared to other skills or abilities, communication skills for example, it is relatively less meaningful.

Appendix 7. shows a basic statistical table of the different variables and their values, minimum, maximum, median, mean and standard deviation are measured with the help of the online tool. This table enables the researcher to examine how widely data are spread around the center, which is important in understanding how these factors affect performance, i.e. research objectives. Minimum is the lowest value, maximum is the highest value, while median is the midpoint in a data set, the place where an equal number of values lie above and below that value. Column 4 contains the value of the arithmetic average, and is what is commonly meant by the 'average', meanwhile standard deviation (σ) measures dispersion (Maylor & Blackmon 2005: 310-313).

The maximum value of the scale is 5, the minimum is 1, resulting in a range of 4. Only in some cases (n= 4) the lowest value was given. On an average 2 was the lowest value, 3 was given only a couple of time (n= 2). This findings mean that all the listed skills and abilities were found to be relevant and somewhat important. According to basic statistic analysis the two most important factors, i.e. willingness to change and communications skills, had 5.00 as their median, which fact further proves the meanings/interpretations people give to these skills.

In describing standard deviation Maylor and Blackmon (2005) state that a value close to 0 can be interpreted as being close to the mean, meanwhile higher standard deviation means data are spread out on a wide range of values. Reading present results three variables tend to be outstanding. These are knowledge of local language (σ= 1,09), international experience (σ= 1,14) and family support (σ= 1,31), meaning that responses of individuals significantly vary on the 1-5 scale. This can be reasoned by the different background of the respondents, such as marital status, length and number of experience, age or gender.

6. DISCUSSION

After conducting the research the next step is to analyze Results and Findings through the lens of theoretical findings. Present part of the thesis aims to discuss these findings simultaneously and to find explanation to the consistencies and inconsistencies. First, the mixed method results are discussed and compared, then adding theory as the third dimension all three types of findings are viewed together.

6.1. Mixed method results

After analyzing the two-fold research results consistencies and inconsistencies were found. The results of the study indicated that included among the difficulties faced by international assignees are separation from family and friends, transitional difficulties, differences in work-related norm, health care, cuisine, and language. Therefore, general adjustment greatly determines the outcome of any international assignment. The successful acquisition of it yields job satisfaction, numerically and emotionally as well. The lack of such ability can be a root of overall dissatisfaction and poor performance. This was confirmed by the survey results with 90,69% of respondents supporting it by sharing experiences, opinions and feelings.

Communication skills was found to be the second factor which has an influence on expatriates, and consequently, impact on their work outcome. This was clearly demonstrated in the respondents' storytelling and experience sharing, while survey results proved it on the average, although the role of local language was excluded.

Another similarity regarding research results refers to the role of technical skills. Based on literature it was expected to be of high importance, as many individuals and firms rank job ability as the primary ingredient relating to their expected probability of success in the international assignment (Hays 1974: 31). On the contrary, interviewed expatriates did not attribute much significance toward possessing such skill. The results

of the online survey further agreed on this view, and rated the factor accordingly, i.e. mid-range.

The only inconsistency came out regarding family support. Although interview respondents declared it is vital and referred to it as motivating factor, survey results did not emphasize on it as much as it was expected. This difference can be due to the various channels through which these individuals participated in the research. Face-to-face discussions provide opportunity for the respondent to express opinions and feelings, expand or modify some previous answers. On the other hand, in the case of surveys, it is only one line per skill or ability with 5 possible answers to choose from.

6.2. Theoretical and empirical results

Previously, findings deriving from the mixed methodology were presented and compared based on the importance respondents attributed to them. Mostly consistencies were found, while only regarding one aspect, in the case of family support, inconsistency was declared.

Table 10. presents the two-fold findings together with theoretical results, and lists the order of the different skills and abilities in each aspect. The column of theory was added with the aim to be used as a base for comparison and for developing discussion.

Table 10. Comparison of results and theory (Own compilation).

THEORY	INTERVIEW	QUESTIONNAIRE
Professional skills	Family support	Class 1. Communication skills
Communication skills	Flexibility	Flexibility
Flexibility	Communication skills	Class 2. Professional skills
Family support	Professional skills	Class 3. Local language Family support

Each column represents its own findings which are to be examined simultaneously. The reference point for comparison is the skills and abilities given by theory, because all four elements of it are present in the interview and questionnaire columns and findings as well, although in different order.

Literature suggested that among the performance detereminnig factors professional skills or technical competence in the job is a distinctive characteristic of a successful expatriate. Meanwhile, interviews and questionnaire results did not prove its pertinence, ranking it as least important or in the case of survey results as class 2 factor. This was supported by respondents saying that technical competence in the job can be an advantage, but because of local differences in work morale and work division such skill has to be learnt locally anyway. Applying for any job position, either in the home or host country, presupposes that the applicant has some level of knowledge required to be able to perform in the job well. In spite of having a certain amount of professional knowledge, training and development are part of an international assignment, which help in gaining more professional knowledge.

Communication skills was sugested to be the second most determining performance factor. Survey results ranked it first, meanwhile during the personal interviews it received third place. Being able to communicate with locals and others was emphasized much during the personal and electronic interviews as well. Respondents claimed that it is necessary to build and maintain close interpersonal contacts that are beneficial for successful work performance. Therefore, its importance was confirmed, but the degree was not.

Regarding the order between communication skills and flexibility ranking provided by theory was supported by the questionnaire findings, meanwhile interview respondents argued that the order should be vica versa. Interviewees considered flexibility more important and beneficial in performing well in the new environment, placing less emphasis on communication skills. Results proved that an expatriate with a good level of flexibility can be more efficient and adjust better, regardless of his/her communication skills.

Family support was ranked as a factor having relatively less importance compared to technical or communication skills, for example. This was confirmed by the online survey results, categorizing it as Class 3 factor. On the other hand, respondents during the face-to-face and electronic interviews focused on the support of family and role of emotional stability many times, evidenced by different examples. Even if the expatriate did not have his/her own family or the family stayed in the home country, their support and communicating regularly with them was much appreciated.

Analyzing findings of the interviews and survey results through the lens of theory the classifications of Hannigan and Stone were proved to be valid to some extent. Hannigan (1990) identified communication skills and flexibility as skills and abilities that an expatriate should possess, while did not mention family support in his list. These findings are really close to the ones provided by the questionnaire.

Although Stone (1991) identifed technical competence as key factor, he also highlighted that regardless of technical skills, people should be able to adopt readily to differences, i.e. flexibility, and further emphasized that adaptability to foreign environment is a prime cause of failure. His findings are also confirmed. Technical skills were mentioned and therefore considered as partly important. On the other hand, interview and questionnaire findings strongly supported the meaningful role of adaptability and flexibility.

The research question of the study was to understand how expatriate performance is affected by certain factors. As the table above and description demonstrate performance of international assignees is affected by several factors, all having some impact on the outcome on the work of the individual. Although different rankings were achieved by the two research methods, the existence of such factors are out of question. Flexibility, or the willingness to change or compromise is a very important influencing factor. The expatriate must have an inner urge to accept what is different or new in the host country and adjust to changes. Aligned with a good level of communication skills and some degree of professional knowledge the expatriate can reach the highest level of UCT, i.e. mastery and contribute to organizational goals to the fullest extent. The lack of these

earlier mentioned skills and abilities can be a root of overall dissatisfaction and poor performance, which is not the desired outcome by the MNC or by the individual.

7. CONCLUSIONS

The final chapter of the study summarizes the theoretical contributions and managerial implications beyond those already discussed. It explains in what ways the research contributes to today's body of literature, meanwhile provides some managerial implications. Although steps were taken to increase the quality of research limitations to the study are also presented here that may affect the reliability of its findings. The chapter closes with suggesting potential research topics, such as examining expatriate performance according to genders.

7.1. Theoretical contributions

Despite of the limitations present study does contribute to today's body of literature on expatriates and their performance in the host environment. Based on the multi-method research design and insightful research, findings in the relationship between international assignees and their performance updated data is provided by researcher. By time and change individuals grow and gain more knowledge and experience, which shape their way of thinking and opinions. Especially in the area of global work and overseas assignments the full understanding of the phenomenon including its elements, and the up-to-date sight are crucial.

Based on findings and discussions researcher provides a most recent list of skills and abilities that affect expatriate performance. Technical skills are no longer listed as number one and must have skills, but adaptability in the foreign environment and communications skills are much emphasized. The role of family and their support is situation-dependent. Qualitative results clearly supported its top priority, meanwhile questionnaire results ranked it last place. Therefore, the two statements that can be made with much confidentiality is that professional knowledge should no longer be a key selection factor, and secondly, adaptability and communication skills are to be focused on.

7.2. Managerial implications

The findings of the present study also have implications for MNCs and their HR managers. Findings can be viewed as feedback from international assignees and based on their experiences job announcements and selection criteria should be less focused on certain criterion, for example, on technical skills. The skills and abilities possessed by the individual more affect his/her performance, and indirectly the operation of the multinational company.

On the other hand, managers should be more aware of their own strengths and weaknesses to better leverage the knowledge, skills and abilities possessed by them at workplace.

Taking another angle, the findings of present study can serve as useful base for managers-to-be by providing some form of a preparation guide on what to consider upon going on an international assignment or in general, in deciding whether to participate in such an international assignment.

7.3. Limitations of the study

All research is compromise, and there are a number of limitations to this study that should be acknowledged. Firstly, due to time constraint, the sample size has been wide, consisting of interviews from both assigned and self-initiated expatriates, therefore the result cannot be generalized to either group, but must be interpreted simultaneously.

Secondly, another possible limitation of the study is that respondents were mainly of Hungarian origin (n= 10), and the host country was Finland in most of the cases (n= 9). The proportion of different nationalities and host countries were neither homogeneous nor heterogeneous enough to enable generalizability of the phenomenon.

Thirdly, it is based on self-reports which may make causal explanations of the results difficult and increase the risk of common method bias. Evaluation from local employees and family members of these transfer processes were excluded from present study, except the one case when both expatriate and the spouse could participate.

Fourthly, limitations arise concerning the incompleteness of electronic interview responses (Maylor & Blackmon 2005: 227), as not all expatriates took the necessary time to give answers with explanations and skipped some of the questions as well.

Fifthly, since the empirical part was conducted by applying mixed methodology different, sometimes opposing findings had to be examined and discussed together. Applying single method research design would have revealed different ranking of influencing factors and thus result in different discussion.

Although steps were taken to increase the quality of research as described earlier in Chapter 4.4., all of these limitations affect the reliability of present study and its findings.

7.4. Suggestions for future research

In the field of global work and international assignments the use of expatriates is a widely applied tool, and most likely this trend will not change significantly. Therefore, to study the phenomenon and update the body of literature, regardless of aspect, is worthwhile.

Present study is restricted to individuals' self-reported performance and work outcome. To achieve a more complex understanding, for instance, the development tool of 360° evaluation could be applied, which would include the evaluation and feedback on the individual's strengths and weaknesses (or "developmental needs" or "opportunities") given by colleagues, supervisors and subordinates working around the expatriate (Jackson 2012). How the individual sees his/her performance can be different from what

the others observe at the workplace. Considering the above mentioned actors further research could be conducted, which would enable the researcher to see the studied phenomenon more thoroughly.

Another possible area of investigation could be regarding the type of expatriate, whether he or she is assigned by the home company, or driven by inner motives. This study discussed theory and findings including both categories, although as evidence shows many differences appear upon comparing AEs and SIEs. Starting with the different initiator behind the change outcomes of each group's analysis can be significantly different.

During the interviews mainly male respondents (81,25 %) participated, while regarding the distribution of online surveys most respondents (60,46 %) were females. Since an emerging trend exists in the rising number of female expatriates (Evans et al 2011: 139), it would be worth examining the two genders separately, and conduct a comparative study of their global performance, while being on an international assignment.

Considering that most of the respondent were Hungarians (country-of-origin of the researcher) living and working in Finland (present location of researcher), another ground for further research could include different settings, for instance, other or bigger variety of nationalities living and working in some American or Asian countries.

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APPENDIX 1. **Assigned expatriates versus self-initiated ones (Shaffer et al. 2012)**

	Corporate Expatriates	Self-Initiated Expatriates
Definition	Employees working for business organizations, who are sent overseas on a temporary basis to complete a time-based task or accomplish an organizational goal	Individuals who initiate and usually finance their own expatriation and are not transferred by organizations. They relocate to a country of their choice to pursue cultural, personal, and career development experiences, often with no definite time frame in mind
Purpose	Managerial control Skill/technology transfer Management development	Personal development Career development
Duration	12 months or more	Varies (short term to permanent stay)
Location	1 country	1 country
Relocation	Usually with family	Usually with family
Compensation	Expatriate packages with numerous benefits Tax equalization Comparable lifestyles	Host country base No relocation/housing benefits
Repatriation	Problematic	Individual decisions and responsibilities
IHRM involvement	Responsible for all aspects of assignment	None
Advantages	Professional and personal development Relationship building and integration with host country nationals Global boundary spanner	Professional and personal development Relationship building with host country nationals
Disadvantages	Expensive Lack of flexibility Family adjustment problems Separation from extended family	Personal risk/expense Contractual obligation Separation from extended family

APPENDIX 2. Global travelers (Shaffer et al. 2012: 1287)

	Short-Term Assignees	Flexpatriates	International Business Travelers
Definition	Employees on international assignments that are longer than business trips yet shorter than typical corporate expatriate assignments; usually less than one year	Employees who travel for brief assignments, away from their home base and across cultural or national borders, leaving their family and personal life behind	Employees who take multiple short international business trips to various locations without accompanying family members
Purpose	Skill/technology transfer Problem solving Management control Management development	Project based Problem solving Skill/technical transfer	Knowledge transfer Negotiations Discussions Meetings or conferences
Duration	Usually 3–12 months	Usually 1–2 months	Usually 1–3 weeks
Location	1 or a few countries	Multiple countries	Multiple countries
Relocation	Usually without family	Without family	Without family
Compensation	Depends on company's travel policy Home country responsibility Taxation may be an issue—depending on duration	Depends on company's travel policy Home country responsibility No tax implications	Depends on company's travel policy Home country responsibility No tax implications
Repatriation	Usually not a problem	Not a problem	Not relevant
IHRM involvement	Little involvement Line manager responsibility	Little involvement Line manager responsibility	Negligible Line manager responsibility
Advantages	Flexibility and simplicity Cost-effectiveness Global boundary spanner	Flexibility and simplicity Cost-effectiveness Global boundary spanner Global perspective	Flexibility and simplicity Most cost-effective Global boundary spanner Relationship maintenance with home-country colleagues
Disadvantages	Separation stress—alcoholism, divorce, health issues Lack of integration with host country nationals	Separation/travel stress—alcoholism, divorce, health issues Time zone differences Lack of social integration at home and host locations	Separation/travel stress—alcoholism, divorce, health issues Time zone differences Host country relationships limited to work colleagues

APPENDIX 3. Authors and their performance-related variables (Own compilation)

	Author (year)	Variables
1.)	Tung (1981)	technical competence in the job personality traits or relational abilities environmental variables family situation
2.)	Evans et al. (2011)	professional and technical competence relationship and communication abilities cultural sensitivity and flexibility self-efficacy and tolerance for ambiguity family factors
3.)	Bonache & Brewster (2001)	technical qualifications
4.)	Mendenhall & Oddou (1985)	technical expertise domestic track record language skills international adaptability
5.)	Hannigan (1990)	ability to communicate ability to establish and maintain relationships interaction management orientation to knowledge, world view cultural empathy linguistic ability flexibility a realistic view of the target culture organization skills
6.)	Stone (1991)	ability to adapt to foreign environment
7.)	Yavas & Bodur (1999)	cultural sensitivity empathy willingness to take assignment cultural preparedness

8.)	Shaffer et al. (2006)	Big Five personality dimensions
		cultural flexibility
		task orientation
		people orientation
		ethnocentrism
9.)	Arthur & Bennett (1985)	family situation
		flexibilty/ adaptibility
		job knowledge and motivation
		relational skills
		extra-cultural openness
10.)	Adler (1983)	professional and managerial skills
		personal and social skills
		cross-cultural and international skills
		spouse and family qualities

APPENDIX 4. Interview guide (English)

Number of interview:

Date and time of interview:

Permission for recording: YES/ NO

1.)   Background questions

Age: …..   Gender: …..   Nationality: …………………………….

Marital status (no of children, if applies): ……………………………………

Level of education: …………………………………………………………..

Job position at the time of assignment: ………………………………………..

Number of previous experience, in what years (single/ multiple):

…………………………………………………………………………………

Target countries (from where to where), length of stay:

 ………………………………………………………………………………….

What skills and abilities you think are most necessary for managing your cross-cultural experience abroad? List a few (1st column).

Skill/ ability	Ranking	In what way?

- Rank each skill and ability according to its importance (2nd column).
- Please prove its importance with some explanation or example (3rd column).

2.)　　Performance-related questions

What was your motivation, goal behind changing environment?

Did you have some fears/concerns beforehand? How did you prepare to avoid them?

Was your family supportive (if you have and they accompanied you)? In what way? Could you tell an example?

How did you and your family feel during the assignment? Please, fill out the table below.

	YOU	YOUR FAMILY
in the new environment		
in the job/ school		
overall well-being		

- How did their feelings affect you?

What were the main problems, difficulties you had to face during your expatriation? How did you handle such problem?

Have you ever considered leaving/ (early) return? If yes, why?

Can you name some skills/abilities you had to improve during the assignment? What was your level before/after? What were the influencing forces?

improved skill/ ability	level before (poor, medium)	level after (medium, excellent)	influencing forces

How would you assess your job performance and contribution to organizational goals?

What prevented you from having a good performance (if applies)?

3.) Closing section

What did you learn through this (these) assignment(s)?

Would you do anything differently now, having experience?

Any suggestions/recommendations for potential expatriates:

Your time is greatly appreciated, thank you! Answers will be handled as confidential information.

APPENDIX 5. **Opinion Survey**

1.) Rate the following skills and abilities according to their importance in your life for managing in a foreign environment.

1- not important at all, 2-not so important, 3- so-so, it depends, 4- important,
5- very important

technical skills & job knowledge	1	2	3	4	5
imagination & creativity	1	2	3	4	5
empathy	1	2	3	4	5
international experience	1	2	3	4	5
willingness to change	1	2	3	4	5
tolerance for ambiguity	1	2	3	4	5
flexibility	1	2	3	4	5
communication skills	1	2	3	4	5
knowledge of local language	1	2	3	4	5
outgoingness & extroversion	1	2	3	4	5
independence	1	2	3	4	5
family support	1	2	3	4	5
emotional stability	1	2	3	4	5
honesty	1	2	3	4	5
initiative & energy	1	2	3	4	5

2.) If you want to expand any of the above stated, please add your comment here.

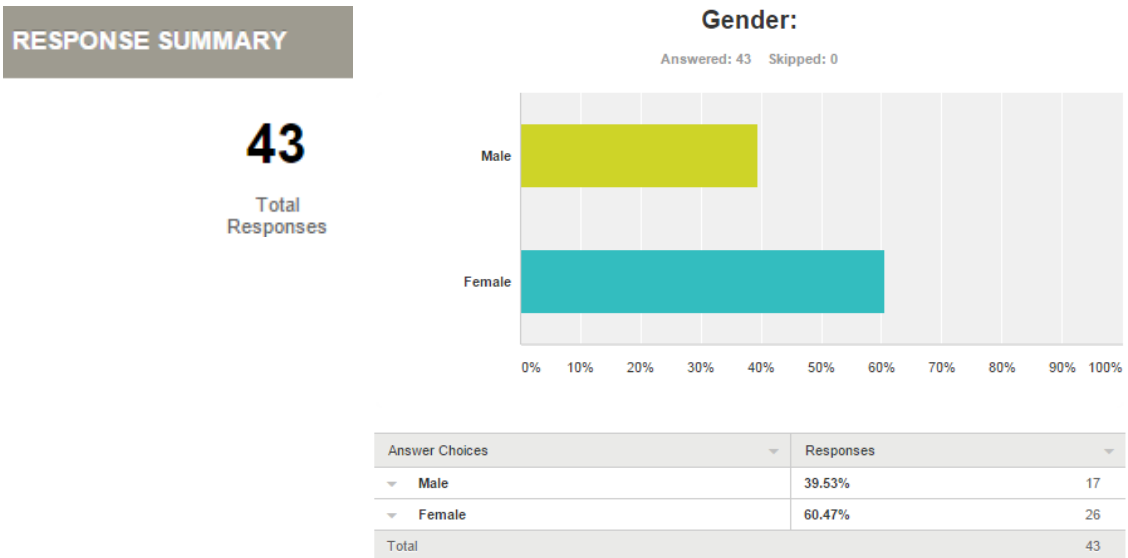**3.) Age:**
4.) Gender:
5.) Family situation:
6.) Job role:
7.) Number of international exchanges (experience)

APPENDIX 6. Response Summary 1.

	not important at all (1)	not so important (2)	so-so, it depends (3)	important (4)	very important (5)	Total	Weighted Average
family support	11.63% 5	13.95% 6	27.91% 12	20.93% 9	25.58% 11	43	3.35
outgoingness & extroversion	0.00% 0	16.28% 7	30.23% 13	46.51% 20	6.98% 3	43	3.44
knowledge of local language	4.65% 2	11.63% 5	34.88% 15	27.91% 12	20.93% 9	43	3.49
international experience	2.33% 1	20.93% 9	11.63% 5	39.53% 17	25.58% 11	43	3.65
empathy	2.33% 1	2.33% 1	25.58% 11	48.84% 21	20.93% 9	43	3.84
honesty	0.00% 0	4.65% 2	23.26% 10	53.49% 23	18.60% 8	43	3.86
imagination &creativity	0.00% 0	2.33% 1	25.58% 11	51.16% 22	20.93% 9	43	3.91
technical skills & job knowledge	0.00% 0	4.65% 2	27.91% 12	30.23% 13	37.21% 16	43	4.00
tolerance for ambiguity	0.00% 0	2.33% 1	16.28% 7	55.81% 24	25.58% 11	43	4.05
emotional stability	0.00% 0	4.65% 2	9.30% 4	62.79% 27	23.26% 10	43	4.05
initiative & energy	0.00% 0	2.33% 1	9.30% 4	62.79% 27	25.58% 11	43	4.12
independence	0.00% 0	2.33% 1	11.63% 5	51.16% 22	34.88% 15	43	4.19
flexibility	0.00% 0	2.33% 1	6.98% 3	48.84% 21	41.86% 18	43	4.30
willingness to change	0.00% 0	0.00% 0	11.63% 5	37.21% 16	51.16% 22	43	4.40
communication skills	0.00% 0	0.00% 0	9.30% 4	30.23% 13	60.47% 26	43	4.51

APPENDIX 7. Response Summary 2.

Basic Statistics					
	Minimum	Maximum	Median	Mean	Standard Deviation
technical skills & job knowledge	2.00	5.00	4.00	4.00	0.91
imagination &creativity	2.00	5.00	4.00	3.91	0.74
empathy	1.00	5.00	4.00	3.84	0.86
international experience	1.00	5.00	4.00	3.65	1.14
willingness to change	3.00	5.00	5.00	4.40	0.69
tolerance for ambiguity	2.00	5.00	4.00	4.05	0.71
flexibility	2.00	5.00	4.00	4.30	0.70
communication skills	3.00	5.00	5.00	4.51	0.66
knowledge of local language	1.00	5.00	3.00	3.49	1.09
outgoingness & extroversion	2.00	5.00	4.00	3.44	0.84
independence	2.00	5.00	4.00	4.19	0.72
family support	1.00	5.00	3.00	3.35	1.31
emotional stability	2.00	5.00	4.00	4.05	0.71
honesty	2.00	5.00	4.00	3.86	0.76
initiative & energy	2.00	5.00	4.00	4.12	0.65