Expatriate Assignment
A Means for Career Development

Case studies of four Swedish MNCs

THOMAS ELINGSBO
JOHAN THORELL

Social Science and Business Administration Programmes
INTERNATIONAL BUSINESS AND ECONOMICS PROGRAMME

Department of Business Administration and Social Sciences
Division of Industrial Marketing
Supervisor: Manucher Farhang
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Abstract

The purpose of this study was to gain an understanding of Swedish MNCs’ use of expatriate assignments for individual career development. In order to reach this purpose, employment of expatriate assignments as a means for career development, expatriate support during the expatriate assignment, and repatriation planning were studied in a qualitative, multiple-case study based on personal interviews with key personnel within the area of research in four Swedish MNCs. Findings indicate that employment of expatriate assignments for individual career development is not extensively adopted by Swedish MNCs, and even though a long-term perspective of expatriation to a certain extent exists, the responsibility for taking initiative is placed primarily upon the individuals.
Sammanfattning

Syftet med denna studie var att nå en förståelse för svenska multinationella företags användande av längre utlandsuppdrag för individuell karriärsutveckling. För att uppnå detta syfte undersöktes användandet av längre utlandsuppdrag som en karriärsutvecklingsmetod, support av utlandspersonal, så kallade expatriater, under uppdraget samt planering av återvändandet till hemorganisationen och hemlandet i en kvalitativ flerfallsstudie baserad på personliga intervjuer med nyckelpersoner avseende detta forskningsområde inom fyra svenska multinationella företag. Resultaten av studien indikerar att användandet av längre utlandsuppdrag för individuell karriärsutveckling inte är vida utbrett bland svenska multinationella företag, och även om ett långsiktigt perspektiv angående längre utlandsuppdrag i viss mån existerar läggs det huvudsakliga ansvaret att ta initiativ på individerna.
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1 Introduction

In this first chapter, a background of the subject of the study will be presented, followed by a problem discussion narrowing down to a research purpose and research questions.

1.1 Background

International business has been growing rapidly in recent decades and today comprises a large and growing portion of the world’s total business (Daniels & Radebaugh, 2001). Due to this growing internationalization of the world’s markets, more and more companies are forced to expand operations into the international business arena (Harzing, 1995). “In today’s global economy, having a workforce that is fluent in the ways of the world isn’t a luxury. It’s a competitive necessity” (Black & Gregersen, 1999, p.53). One determinant of success or failure in international business is international human resource management, or IHRM (Deresky, 2003).

While human resource management (HRM) is responsible for all aspects of employee administration, IHRM takes care of these functions as well as additional ones, such as the management of human resources in global corporations; the management of expatriate employees; and the comparison of HRM practices in a variety of different countries (Francesco & Gold, 1998). According to Francesco and Gold (1998), IHRM is responsible for five functional areas: recruitment and selection, training and development, performance evaluation, compensation and benefits, and labor relations. The authors further explain three different classifications of employees in international organizations: Parent Country Nationals (PCN) where the employee’s nationality is the same as the organization’s; Host Country Nationals (HCN) where the employee’s nationality is the same as the location of the subsidiary; and Third Country National (TCN) where the employee’s nationality is neither that of the organization nor that of the location of the subsidiary. A major part of IHRM is managing expatriates, that is PCNs and TCNs, employees who work outside their home countries (Francesco & Gold, 1998). Due to factors such as increasing international competition, international mergers and acquisitions, and new market opportunities resulting from markets such as Eastern Europe, China, and the former Soviet Union opening up, there is an increasing need for international assignments, and thus also for managers and other employees to become expatriates, working and living in a foreign country (Baumgarten, 1995).

1.1.1 Expatriate Management

Expatriate management is defined by Peterson, Napier, and Shul-Shim (2000, p.145) as “those issues relating to the use of parent-country nationals (PCNs) and third-country nationals (TCNs) in foreign subsidiaries of MNCs”¹. The choice to employ locals or send an expatriate often depends on the availability of qualified managers in the host country (Deresky, 2003) or on a perceived trade-off between the need for technical versus territorial

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¹ MNCs are defined by the United Nations as “enterprises which own or control production or service facilities outside the country in which they are based” according to Czinkota and Ronkainen (2001, p.489).
competence (Pucik, 1985). Expatriates are often selected for top management positions, while locals are often hired for middle and lower management positions (Deresky, 2003). The main tasks of expatriates often include directing the daily operations of foreign affiliates, supervising transfer and managerial and technological know-how, communicating corporate policies, keeping the home-office informed about relevant developments in host country, and communicating and coordinating the corporate strategic objectives with the local management (Pucik, 1985).

Black and Gregersen (1999) identify two principal objectives of sending expatriates: to generate knowledge for the organization, and to develop global leaders. The first objective involves transferring knowledge from headquarters to subsidiary, as well as learning from that subsidiary. The second objective involves long-term development of global leaders. In order for an executive to develop a global perspective on business, it is an imperative to have spent time working abroad (Ibid). However, the authors state that many businesses, unfortunately, send people abroad only to fill a burning business need. Although immediate business needs cannot be ignored, Black and Gregersen (1999) found companies managing expatriates effectively to view foreign assignments with an eye on the long term. More specifically, they found three general practices among successful expatriations: a focus on knowledge creation and global leadership development; a selection of people whose technical skills are exceeded or matched by their cross-cultural abilities; and the use of a deliberate repatriation process well planned in before. Repatriation refers to the return of the expatriate to the home country (Oxford, 1995).

1.2 Problem Discussion

International assignments are very expensive. According to Black and Gregersen (1999), expatriates cost two to three times more for the companies compared to an equivalent position at home. Furthermore, a large degree of expatriate assignments end up in failure.

Black and Gregersen (1999) found that between 10 and 20 per cent of all U.S. managers sent abroad returned early because of job dissatisfaction or adjustment difficulties, and of those who completed the assignment, nearly one third did not meet the expectations. They also found that of those who completed the assignment, one fourth left the company within one year after repatriation. Further, Webb and Wright (1996) found that as many as 40 per cent of all expatriates are prematurely withdrawn from their foreign assignments due to poor performance or inability to adjust to the foreign environment. They also found that as many as 50 per cent of those remaining on their assignment function at a low level of effectiveness. Although criticism has been directed towards figures such as these (see for instance Harzing, 1995), Tung (1982) has found that recall rates of U.S. MNCs are considerably higher than those of European and Japanese MNCs. Tung (1981, 1987) also states that expatriate failures not only represent a substantial cost to the companies, but also constitute a human resource waste since most of the failed expatriates had a previous good track record before the overseas assignment. She (1987) also alleges that such failures can cause a heavy blow to the self-esteem and ego of the expatriate. Failed overseas assignments may also cause damage to corporate reputations or lost business opportunities (Webb & Wright, 1996).

An expatriate assignment not only poses challenges in terms of new tasks and responsibilities, but also on adaptive capabilities and cultural sensitivity (Baumgarten, 1995). Further,
Mendenhall and Oddou (1988) state culture shock\(^2\) (most often of the spouse) to be the main reason of expatriate failure. It is most often more problematic for the family to adjust to the new environment and interact with locals (Suutari & Burch, 2001). According to Hofstede (1997), culture shocks have in some cases been reported to last more than one year and caused expatriate assignments to been terminated in advance. In order to prepare the selected expatriate with the necessary skills to interact effectively in another culture, cross-cultural training (or CCT) is essential (Webb & Wright, 1996). The purpose of pre-expatriation CCT is to prepare the expatriates and their families to adjust to the new culture, educate them about the dynamics of culture shock and teach them techniques for dealing with the related stress, and also to determine if employees possess skills and knowledge needed (Wright, Geroy, Baker, 1996). Mendenhall and Oddou (1985) further allege that it is of vital importance to include the spouse and family of the expatriate in the training as well, in fact, it is actually more important to provide such training for the spouse than for the expatriate (1988). “Although the expatriate may possess the necessary skills for successful international adjustment, if his or her spouse does not possess these same skills, an aborted assignment may ensue simply because the spouse or family members cannot adjust to the new culture” (Black et al, 1991, p.295).

However, firms vary in the type of training they offer (Mendenhall & Oddou, 1988), and even though cross-cultural training cannot fully erase the effects of a culture shock, it can reduce the effects by making participants aware of the most common psychological reactions to a change in cultural environment (Gertsen, 1992). The pre-expatriation period is therefore of great importance in order to provide possibilities for expatriate success. However, Borg and Harzing (1995) state the actual period abroad to be the most crucial phase. Furthermore, Lazarova and Caligiuri (2001) state that most activities that ensure that expatriates remain within the organization after the expatriate assignment occur during the expatriate assignment.

Just as MNCs vary in training commitment and procedures, they vary in their support of expatriates and their families when on the foreign assignment (Mendenhall & Oddou, 1988). However, organizational support is an important part of expatriate success – Kraimer, Wayne, and Jaworski (2001) found perceived organizational support to be a significant predictor of expatriate adjustment to the foreign country. Even though many options of how to support employees overseas exist, many firms practice the “out of sight, out of mind” philosophy (Mendenhall & Oddou, 1988; Borg & Harzing, 1995). According to Mendenhall and Oddou (1988), a committed MNC can encourage the expatriate to call home office as often as needed. Expatriates must also be able to ask questions, receive guidance and suggestions from senior expatriates, or just have someone who will listen. They further recommend MNCs to inform the expatriate of any local support system or network with other MNCs’ expatriates in the same area. Borg and Harzing (1995) state that while some companies have a system for keeping in touch with the expatriate, it is usually up to the business area, division, or strategic unit to take care of this. However, a rather easy way of solving this problem is to ask someone at home to send newspapers and information in general to the expatriate, as well as encouraging the expatriate to keep informed about the home country and office (Ibid). Webb and Wright (1996) add that MNCs must further monitor such communication channels in order to assure that they work. They further allege that expatriate training and development

\(^2\) Deresky (2003, p.401) discuss culture shock as “a state of disorientation and anxiety about not knowing how to behave in an unfamiliar culture”, and further state that the symptoms of a culture shock range from mild irritation to psychological panic or crisis.
must go beyond orientation and cross-cultural training to on-site involvement and support. Methods suggested to increase overseas support include HCN networks, and home- as well as host-country mentoring (see for instance Black & Gregersen, 1991; Harvey, Buckley, Novicevic & Wiese, 1999; Feldman & Bolino, 1999). Black and Gregersen (1991) suggest that social support from HCNs can facilitate adjustment since they understand the host culture; can provide information on, and explanations of, the host culture; can provide feedback on the appropriateness of behaviors; and this altogether can serve to reduce uncertainty regarding the general culture. Harvey et al (1999) further suggest that the process of mentoring an expatriate and the trailing spouse could enhance the probability of expatriate success and contribute to the adaptation to the culture of the host country. They envision that mentoring may provide personal and professional guidance to expatriates facilitating socialization to both host country and foreign subsidiary culture. This mentoring process should be viewed as an on-going socialization process throughout the entire expatriation process ranging from pre-expatriation to repatriation (Ibid).

Even when expatriates complete their assignments successfully, an achievement they believe deserves recognition, Black and Gregersen (1999) state that they are often disappointed by the lack of organizational interest in their new skills and knowledge. Black and Gregersen (1999) found that many of the expatriates studied left their company within one year after the expatriate assignment was ended, and conclude that most companies do not take the matter of repatriation seriously. Further, changes in the home organization can cause difficulties for the expatriate’s readjustment if unprepared. Similarly, changes in the personal life of the expatriate and his or her family also cause readjustment difficulties (Ibid). Friends may have moved away, and children may find it hard to settle back into school (Ibid).

Webb and Wright (1996) discuss that adjusting to repatriation is often more difficult than adjusting to expatriation. Expatriates generally have high expectations on their transition back home, only to find that they have lost the financial benefits of the foreign assignment, there are no well established plans of how to reposition them in the home organization, and they often feel that their assignment was of little or no value to management (Ibid). Baughn (1995) further states that the apparent inability of many MNCs to profitably reposition their repatriates has led to expatriates leaving their MNCs upon repatriation, thus leading to reduced return on investment made by the sponsoring MNC. Many expatriates are disappointed by the lack of impact the foreign assignment has on their overall career within their MNC (Ibid). The expatriates may feel that they have lost touch with many of the priorities, norms, and procedures of the home organization while overseas, which may also be coupled with loss of personal contacts, failure to keep up with new technologies, or the irrelevance of the international experience to the assignment provided upon return (Ibid). Further, the author states that many returnees find that their foreign assignment offered greater responsibility, influence, and status than does the job to which they return. “Considering the substantial cost of placing and maintaining overseas personnel, problems in reentry can make expatriate assignments a risky investment” (Baughn, 1995, p.216).

A key issue in expatriate success is, according to Black and Gregersen (1999), to send people for the right reason. They allege that expatriate assignments should be viewed with a long-term focus on knowledge creation and global leadership creation. When taking a more long-term view on expatriation and sending expatriates for knowledge creation and leadership development purposes, the repatriation comes as a more natural and deliberate step in the overall career development of the expatriated individual (Black & Gregersen, 1999). Black
and Gregersen (1999) further allege that MNCs managing expatriates successfully prepare their expatriates for the transition back home at least three to six months in advance. Such repatriation preparation includes handling changes in both personal and professional areas.

Baughn (1995) states that, in order to gain a more global perspective and to increase strategic control, it is important to take advantage of the knowledge of the expatriates who have spent time working abroad in different cultural environments. Yurkiewicz and Rosen (1995) state that it is of vital importance for organizations to integrate foreign assignments with the overall career planning of the expatriate. Career paths must be structured to capitalize on the knowledge and experience of expatriates returning from their assignments (Ibid). According to Black, Gregersen, Mendenhall, and Stroh (1999, p.4), “[a]n international assignment is the most powerful means of developing the skills and knowledge that future leaders will need”. The study performed by Yurkiewicz and Rosen (1995) indicated that many potential expatriates would be more receptive to moving abroad if offered a guarantee of an attractive position after completion of their assignment. Tung (1988) further states that the impact of an international assignment on the repatriate’s overall career development and advancement in the organization is an often neglected area of research in international human resource management, and Stahl, Miller, and Tung (2002) highlight the need for more research about the career implications of an international assignment.

1.3 Research Purpose

Since the incorporation of expatriate assignments in individual career development is indicated to be an often neglected area of research, and considering the statement by Black and Gregersen (1999) that companies managing expatriates successfully often have a long-term view on foreign assignments, it would be of interest to study how Swedish MNCs use expatriate assignments for career development purposes. Therefore, the purpose of this study is:

to gain an understanding of Swedish MNCs’ use of expatriate assignments for individual career development.

1.3.1 Research Questions

In order to reach the above stated purpose, the first research question aims at studying Swedish MNCs’ use of expatriate assignments as a means for career development, and is therefore formulated:

1. How can Swedish MNCs’ employment of expatriate assignments as a means for career development be characterized?

Considering Borg and Harzing’s (1995) statement that the actual period abroad is the most crucial one, as well as Lazarova and Caligiuri’s (2001) statement that most activities to ensure that the repatriated individual remains within the organization occur during the expatriate assignment, support during the expatriate assignment is perceived to be a crucial factor of a successful long-term career view on expatriate assignments. It would therefore be of interest
to include in the study the support provided by Swedish MNCs during the expatriate assignment.

2. How can Swedish MNCs’ expatriate support during the expatriate assignment be characterized?

Further, since repatriation planning is crucial for, and closely tied to, career development (see for instance Black & Gregersen, 1999), it would also be of interest to study how Swedish MNCs plan for the repatriation of expatriates.

3. How can Swedish MNCs’ repatriation planning be characterized?

By not solely studying the intentions of the MNCs, but also including their support and repatriation planning practices, an even deeper understanding of Swedish MNCs’ use of expatriates assignments for individual career development is aimed for.

1.4 Demarcations

Even though suggestions have been made to study the career impact of an expatriate assignment, this study will focus on the intentions and practices of MNCs since a study of career impacts of an expatriate assignment would require a quantitative cause-and-effect study. Since such a study would necessitate influences of the actual assignment to be isolated from other influencing factors, this was not perceived to be feasible within the boundaries of this study due to limitations in resources.

In this study, career development does not solely refer to advancements in organizational hierarchy. Career development, as referred to in this study, includes all development in which the individuals’ knowledge and experiences are better deployed by their organization, and in which the individuals are placed in positions suitable to their capability.

Extensive research within the field of expatriate management has been conducted on pre-departure cross-cultural training, and pre-departure cross-cultural training is an area of research extensive enough to warrant studies to completely focus on this topic. Considering the statements that the period abroad is the most crucial phase (Borg & Harzing, 1995) and that most activities to ensure that expatriates remain within the organization occur during the expatriate assignment (Lazarova & Caligiuri, 2001), cross-cultural training will only be studied as part of expatriate support during the expatriate assignment in the form of on-site cross-cultural training.

1.5 Disposition of Study

Following this introductory chapter in which a problem discussion has been narrowed down into a research purpose and three research questions, a review of literature dealing with the areas of the three research questions will be presented in chapter two. Thereafter, parts of the literature will be selected in chapter three to be used as variables in a frame of reference to aid in the data collection. In the fourth chapter, the methodology of the study will be presented.
before presenting and analyzing the data collected in chapter five and six. In the data analysis chapter, each case will be separately compared to the frame of reference in within-case analyses before comparing the empirical data of the four cases in a cross-case analysis. Finally, in chapter seven, conclusions will be drawn from the data analyzed, and implications for management, theory, and future research will be suggested. A visualization of the disposition of this study is presented in figure 1.1 below.

Figure 1.1: Disposition of Study
2 Literature Review

In this chapter, literature on the topic of this study will be presented, starting with literature dealing with issues regarding career development, continuing with expatriate support, and finally repatriation planning literature.

2.1 Career Development

Black and Gregersen (1999) identify two principal objectives of sending expatriates: to generate knowledge for the organization, and to develop global leaders. The first objective involves transferring knowledge from headquarters to subsidiary, as well as learning from that subsidiary. The second objective involves long-term development of global leaders. In order for an executive to develop a global perspective on business, it is an imperative to have spent time working abroad. However, the authors state that many businesses, unfortunately, send people abroad only to fill a burning business need. Although immediate business needs cannot be ignored, Black and Gregersen (1999) found companies managing expatriates effectively to view foreign assignments with an eye on the long term. More specifically, they found three general practices among successful expatriations: a focus on knowledge creation and global leadership development; a selection of people whose technical skills are exceeded or matched by their cross-cultural abilities; and the use of a deliberate repatriation process well planned in before.

2.1.1 The Role of the International Assignment in Career Development

Oddou, Derr, and Black (1995) state that European MNCs traditionally has employed expatriation as a primary tool for international career development. The authors further state that there is a strong belief that international experience through expatriate assignments will continue to be critical to the development of effective global leaders for European firms.

According to Fish and Wood (1994), the integration of international business and expatriate career management is an important consideration for any firm wanting to succeed internationally. Therefore, the linkage between expatriate experience and the overall career and business strategies must be addressed by the MNC. Further, there is a clear need for attention to the manner in which expatriates are attracted, selected, prepared, managed and repatriated in the best interest of the expatriate and the organization. It is important that the expatriates are informed in advance why they are being sent overseas, what is expected of them, the level of discretion they will have, and in which functional areas. This information will help the expatriates focus on the specifics of the job, rather than trying to find out the reasons for their expatriate assignments. It is also important that the expatriates are fully informed about the fit between their expatriate assignment and their overall career development and where they can gain on-going information about their career. In accordance with this discussion, Black and Gregersen (1999) state that not every expatriate has what it takes to become a future high-ranking manager. However, it is of vital importance that the organization, as well as the expatriate, knows the rationale of the expatriate assignment and its effects on the overall career of the expatriate.
Oddou et al (1995) found in a study including 69 European MNCs that 55 per cent of the top 50 managers within the European MNCs had been sent on at least one international assignment during their career. Similarly, Tung (1988) found that in most European MNCs, an international assignment is seen as an important requisite for organizational advancement. She further states that many European MNCs used to have a cadre of career expatriates that were moved from country to country. However, due to the high costs associated with expatriation, the MNCs had to reduce the number of expatriates, and faced difficulties because these career expatriates usually was not qualified for a suitable and challenging job in the home organization. The MNCs were therefore often forced to offer early retirement deals. To prevent this situation from recurring, MNCs are increasingly using expatriate management for career development purposes, and will nowadays often refuse to send an employee on an international assignment unless he or she is perceived to have potential and skills for a higher-ranking position in the home organization upon repatriation. Further, Dowling and Schuler (1990) add that MNCs are now recognizing the need to expand international experience from a small cadre of expatriates to many levels of management, and are therefore using expatriate assignments as an employee development tool.

2.1.2 Evaluating Expatriate Performance

Gregersen, Black, and Hite (1995) state that MNCs must design accurate expatriate performance appraisals in order to ensure higher positive returns on these international human resource investments. According to the authors, the design process includes defining the strategic goals for expatriates and international assignments, identifying the specific uses for performance appraisals, and incorporating the unique contexts of expatriate assignments into the design of expatriate performance appraisals.

Gregersen et al (1995) further state that the strategic goals of sending expatriates might, for instance, include bringing a global perspective back to corporate headquarters, coordinating subsidiaries and headquarters, transferring critical technologies and innovations, or developing future global leaders. Accurate performance appraisal system must be able to determine whether or not expatriates actually meet these goals.

In order to increase the accuracy of expatriate performance appraisals, the authors state it necessary to identify the specific purposes of the appraisal and design the appraisal accordingly. According to Cleveland, Murphy, and Williams (1989) in Gregersen et al (1995), the most common uses are for developmental, evaluative, and administrative purposes. However, Gregersen et al (1995) state that appraisals often serve multiple purposes, and MNCs must be aware that one standard appraisal purpose or design may not adequately meet all needs, especially for expatriate assignments. For expatriates, MNCs can utilize expatriate appraisals to identify training needs of expatriates, develop overseas managers with critical cross-cultural experience, evaluate the ability to function in a foreign location, monitor relationships with local nationals, provide performance feedback from peers, and assess the ability to work with, and manage, others.

The third step toward increasing the accuracy of expatriate performance appraisal systems is, according to Gregersen et al (1995), to recognize the unique context of international assignments affecting expatriate performance. Such contextual aspects include, in particular, societal, legal, economic, technical, and physical aspects and demands. Evaluating expatriates with the same performance appraisal systems as their domestic counterparts often provide an
inappropriate evaluation result. Basically, evaluating expatriates on the same criterion as their
domestic counterparts often produce biased results since comparisons assumes that two
situations are nearly identical, which is not often the case when dealing with different
countries and cultures. Therefore, a critical key to developing accurate expatriate performance
appraisal systems is identifying and considering international contextual criterion that may
affect or influence success in international assignments.

2.1.3 Expatriates’ Expectations and Career Implications
Stahl et al (2002) conducted a study of German expatriates in which they found that the
majority of the expatriates believed their international assignment to be an opportunity for
personal and professional development and career advancement, even though not necessarily
within the same organization. The findings indicated that an overwhelming majority of the
expatriates believed that their international assignment will have a positive impact on future
career opportunities among other employers, while considerable fewer expatriates thought
that it would help them advance within their current company. The expatriates generally
believed that their international assignment had a positive impact on their overall career due
to improved managerial, interpersonal, and communication skills, and since it enabled them to
develop a valuable network of personal relationships. The study also found that 51 per cent of
the expatriates were willing to employ these newly gained skills and knowledge in another
organization, whereas only 25 per cent stated that they were unwilling to leave their company
upon return. Considering that expatriate assignments are often used for career development
purposes, the damages to the company of such potential turnover can in the long-term be
incredibly high.

Further, Stahl et al (2002) state that a discrepancy between the stated strategies of most
companies to internationalize their business and their actual IHRM policies and practices with
the consequence that expatriates may perceive a disconnection between their international
assignments and their long-term career plans is often reported. Such a discrepancy was also
found in their study. A lack of long-term career planning as well as company support during
the overseas assignment were the most important reasons expatriates perceived such a
discrepancy. The respondents were further skeptical that their companies will reward them for
pursuing an international assignment, for developing an international perspective and a
worldwide network of associates, and for acquiring fluency in a foreign language, and were
generally dissatisfied with the long-range planning of their repatriation.

The authors further discuss that practices such as managing the expatriates’ career
expectations, providing career-path information, organizing participation in networking
activities that allow expatriates to stay in contact with key individuals in the organization,
providing on-going coaching or mentoring, continuously reviewing performance during the
international assignment, and improving expatriates’ career self-management skills can
facilitate the career-pathing and development of expatriated individuals. Further, Lazarova
and Caligiuri (2001) found that expatriates especially consider as important visible signs and
demonstrations that the organization values international experience, and that this
international experience is beneficial to the individual’s career development. Similarly, Stahl
et al (2002) state that companies must put much more emphasis on rewarding the international
skills of the individuals in order to retain them upon repatriation.
2.2 Expatriate Support

Kraimer et al (2001) studied the role of perceived organizational support (POS) on expatriate adjustment. Perceived organizational support was in the study defined as employees’ general beliefs about the extent to which their organization values their contributions and cares about their well-being. The authors state that the parent company constitute the initial source of support and provide benefits and services prior to arriving and once in the foreign country that will effect the expatriate’s quality of life and work in that foreign country. Such support and services include, for instance, financial benefits to maintain the standard of living the expatriate is used to in the home country, cross-cultural training, assistance in housing relocation, membership in clubs in the foreign country, rest and relaxation vacation leave, assistance with schooling for children, spousal employment, as well as maintaining the communication with the expatriate to ease his or her repatriation anxieties. However, foreign company support may be even more crucial for continued expatriate adjustment since the expatriate is working there on a day-to-day basis.

Foreign company support includes foreign language courses, socialization experiences, as well as opportunities to interact with host country nationals. Expatriate adjustment is discussed in terms of Black’s three types of adjustment: work adjustment – adjustment to job responsibilities, supervision, and performance expectations; general adjustment – adjustment to housing, food, shopping, and so forth, and; interaction adjustment – adjustment to socializing and speaking with host-country nationals (as described by McEvoy & Parker, 1995). It was found in the study that parent company POS was positively related to the expatriate’s general adjustment, whereas foreign company POS was positively related to work and interaction adjustment. These findings support the belief that the parent company provides more global support in terms of financial and general support that helps the expatriate adjust to (any) foreign country. The foreign company, on the other hand, provides day-to-day support that facilitates adjustment to the actual work setting and interacting with foreign nationals. The study also found that expatriates who are well adjusted at work and who are comfortable interacting with host-country citizens are perceived to be higher performers by their managers on task and expatriate contextual performance. Furthermore, expatriates who are comfortable interacting with foreign nationals are in general also more adjusted to the country. The important statistical relationships found in the study are shown in figure 2.1 below.

![Figure 2.1: POS Relationship Model](image)

Source: adapted from Kraimer et al, 2001
According to Kraimer et al (2001), these findings highlight the importance for organizations to provide expatriates with training for and opportunities to interact with host country nationals. Further, the fact that parent company POS was positively related to the expatriate’s general adjustment suggests that it is important for an organization to realize that the support of the organization stretches outside the boundaries of work environment. The parent company should therefore combine their pre-departure cross-cultural training and financial support with other support services such as on-going career counseling, psychological counseling for expatriates experiencing stress and anxiety, as well as in-country contractual services to help with the transition period. The found relationships between foreign company POS with work and interaction adjustment further pinpoints the possible benefits of providing host country support such as having one or several persons available to the expatriate to answer questions that may arise, post-arrival cross-cultural training, or to implement a formal mentor system as suggested by, for instance, Feldman and Bolino (1999) or Harvey et al (1999). Black (1992) alleges that post-arrival cross-cultural training a month or so into the assignment in particular may be an effective collective socialization tactic as well as an effective means of helping expatriates learn about the culture and business practices of the country in which they will be working and living. Finally, the finding that expatriate adjustment relates to performance on the job indicates that it is worth the parent company’s time and expense to help expatriates adjust to the foreign company and develop the skills needed to interact with host country nationals (Kraimer et al, 2001).

2.2.1 Compensation

Dowling and Schuler (1990) discuss expatriate compensation as an important factor in international human resource management. The most widely used compensation policy, according to the authors, emphasizes that expatriates should not suffer a material loss due to an international transfer. This is usually accomplished by employing what is known as the balance sheet approach. Figure 2.2 on the next page depicts the balance sheet approach as visualized by Reynolds (1986) in Dowling and Schuler (1990). According to Dowling and Schuler (1990, p.118), Reynolds (1986) states that “the balance-sheet approach to international compensation is a system designed to equalize the purchasing power of employees at comparable position levels living overseas and in the home country, and to provide incentives to offset qualitative differences between assignment locations”. In order to sustain the living standards the expatriates are used to in the home country, the MNCs usually cover additional costs and expenses such as extra housing costs, shipment and storage of personal and household effects, children’s education costs, and higher taxes. Expatriates often receive a salary premium as an incentive to accept a foreign assignment or to compensate for any hardship suffered due to the transfer. Currency protection is further an issue that must be considered when discussing compensation, the base salary of an expatriate is usually paid either in the home currency at the home rate or in the local currency at a rate equivalent to the rate paid locally for the same job. Policies regarding exchange rate adjustments are therefore necessary to assure that all employees are treated fairly. Further, salary adjustments and promotional practices may be employed according to either home country or local standards. Global salary and performance structures can also be utilized. Compensation could also be offered as benefits such as free annual air flights back home for the expatriate and the trailing family.
Francesco and Gold (1998) also discuss different types of expatriate compensations similarly to the discussion above. Typical expatriate benefits as discussed by Francesco and Gold (1998) are shown and explained in table 2.1 below.

Table 2.1: Typical Expatriate Benefits  

<table>
<thead>
<tr>
<th><strong>Overseas Premium</strong></th>
<th>Additional percentage of base salary (usually 10%) paid to compensate for inconvenience of living abroad</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Housing Allowance</strong></td>
<td>Provision of comfortable housing for free or at a rate similar to what the expatriate would incur at home</td>
</tr>
<tr>
<td><strong>Cost-of-Living Allowance</strong></td>
<td>Payment of additional amount to cover extra costs to allow expatriate to live in the same way as at home – for example, to buy home country foods and other products</td>
</tr>
<tr>
<td><strong>Moving Expenses</strong></td>
<td>Expatriate and family transportation and goods shipment to and from assignment location</td>
</tr>
<tr>
<td><strong>Tuition for Dependent Education</strong></td>
<td>Reimbursement for expatriate’s children to receive a home country education, for example, private school in the assignment location or boarding school back home</td>
</tr>
<tr>
<td><strong>Home Leave</strong></td>
<td>Expatriate and family transportation and time off to return home</td>
</tr>
<tr>
<td><strong>Tax Reimbursement Payments</strong></td>
<td>Reimbursement for any additional taxes payable by expatriate as a result of living abroad</td>
</tr>
</tbody>
</table>
2.2.2 Mentoring

Yurkiewicz and Rosen (1995) allege that providing a mentor helps reduce the “out-of-sight, out-of-mind” concern of many expatriates. Expatriate mentoring, an information-exchange relationship in which a mentor and an expatriate share information on the expatriate’s career and development issues, is especially important when the expatriate is trying to adjust to the culture shock experienced when first entering the host organization and culture (Harvey et al, 1999). Expatriate mentoring may help the expatriate recognize the critical environmental cues and develop effective coping skills. It may also help the expatriate maintain a positive social image and track record in the parent organization by helping him or her to avoid making mistakes in the foreign assignment. Expatriate mentoring serves two functions in a MNC: 1) preventive – providing social support and cultural guidance to the expatriate and the trailing spouse; and 2) developmental – helping the expatriate acquire the social knowledge applicable to the global organization (Ibid).

In the study on potential positive outcomes for expatriates of mentoring during their expatriate assignment, performed by Feldman and Bolino (1999), it was found that the host country’s culture has a significant impact on how much informal mentoring expatriates receive while on their foreign assignment. Expatriates are more likely to receive mentoring in small power distance, weak uncertainty avoidance, and individualistic countries (using Hofstede’s, 1997, national culture framework). They also found that on-site mentoring (in the form of task assistance, career assistance, psycho-social support, and role modeling) during an expatriate assignment is positively related to expatriate socialization, and that expatriate socialization, in turn, is positively related to job satisfaction, intention to finish the expatriate assignment, and increased knowledge about international business.

However, the research in the study described above does have some limitations, leaving some aspects unanswered (Feldman & Bolino, 1999). For instance, while the research focused on the amount of mentoring received, it did not address the quality of mentoring and the impact that mentoring quality or thoroughness might have on expatriate socialization. Nor did the data include the nature of the assigned job functions. The degree to which expatriates’ jobs are technical, managerial, or interactive may affect the amount of mentoring received or needed. Furthermore, the authors indicate that the amount of formal pre-departure and post-arrival training might influence the need for, and effectiveness of, expatriate mentoring.

Assistance is likely to be needed throughout the overseas assignment in order to make sense of the culture, unfamiliar behaviors and demands in the new host environment. Harvey et al (1999) discuss expatriate mentoring as an on-going process that extends throughout the phases of the expatriation process; pre-expatriation, expatriation, and repatriation. This mentoring process, which the authors call global mentoring, is envisioned as an institutionalized program to help the mentee3 to make sense of the expatriation experience, and develop self-efficacy in culturally challenging situations.

Pre-Expatriation Phase

In the pre-expatriation phase, the mentor can discuss potential problems with the expatriate, thus facilitating the development of realistic expectations for the foreign assignment (Harvey et al, 1999). In this phase, the mentoring should be focused on the expatriation assignment and assisting the mentee with issues concerned with preparation for the international assignment.

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3 Individual being mentored, also called protégé.
relocation. It is also of vital importance for the mentor to provide both the expatriate and the trailing spouse with a realistic review and information about potential issues of the foreign assignment, and enable the development of effective coping skills, in order to prevent withdrawal and requesting of transfer to the home country. The mentor should further facilitate the establishment of social ties of the trailing spouse and children during their overseas assignment to help them adjust to the new social environment.

Expatriation Phase
This process of cultural navigation can, according to Harvey et al (1999) be supplemented and supported by an additional, host-country, mentor during the expatriation phase of the foreign assignment. This mentor could help the expatriate adjust by providing practical insights to supplement the cross-cultural training and mentoring received before the expatriation. Since this host-country mentoring is crucial for early adjustment, this mentor should be formally assigned to the expatriate and the trailing spouse, even though a certain degree of personal identity with, and commitment to, the mentees must be strived for. This mentoring process must be frequently evaluated in order to assess the suitable degree of formal/informal professional/social support. Both the expatriate and the trailing spouse must also be monitored on a regular basis in order to assess their stress and adjustment progress, and to provide the mentor with valuable insights on the guidance and support needed to facilitate the expatriate couple’s adjustment process. This on-site mentor should further help the expatriate and the trailing spouse prepare for the repatriation, ideally six to nine months prior to the domestic relocation. Ideally, the home-country mentor has kept in contact with the expatriate couple during the foreign assignment in order to keep them up to date with information from back home and to make the transition between the mentors as smooth as possible when ending the expatriate assignment.

Repatriation Phase
In the repatriation phase, Harvey et al (1999) state that mentoring could help to solidify the expatriation experience and facilitate the career development of the returned expatriate and trailing spouse. The main responsibility of the mentor during this phase is to facilitate the expatriate’s reentry into the home country organization and provide knowledge of the current formal or informal organization. This is especially important if organizational changes in the form of mergers, acquisitions, or significant number of new managers have occurred. Attention to the adjustment of the spouse and family is also of importance – all to often they are left on their own, without the assistance of the organization. Usually, the career of the spouse has been interrupted by the expatriate assignment, and the stress of the spouse when trying to assume his or her career may spill over into the expatriate’s adjustment to the home-country organization.

Harvey et al (1999) state that formal mentoring relationships such as those described above have a number of negative aspects, but may be the only means to facilitate a successful expatriation experience. The mentoring program must be periodically evaluated and adjusted. Therefore, transforming returned expatriates into mentors is important in order to take advantage of their experiences and ideas regarding future alterations in the mentor program.

2.2.3 Post-Arrival Cross-Cultural Training
Selmer, Torbiörn, and de Leon (1998) discuss cross-cultural adjustment in terms of four distinct phases: the ethnocentric phase in which experiences in the host culture are interpreted
as deviations from the “correct” behavior; culture shock phase in which a defensive coping mechanism sets in; the conformist phase in which the individual starts to adjust more effectively to the host culture, and; the last phase – culturally adjusted. The authors recommend sequencing of training methods so that learning from one phase enhances the learning in later phases. The timing and content of cross-cultural training should be designed to the adjustment phases so that learning occurs at the same time as expatriates discover the inappropriateness of habitual behavior. Pre-departure training should focus on essential information on conditions in the host country. Pre-departure training is often too short-term to teach the expatriate appropriate behavior, and should therefore concentrate on the cross-cultural adjustment process and provide the expatriate with knowledge about the different phases and potential difficulties that may occur during the adjustment process.

During the first phase, post-arrival cross-cultural training should enhance cultural awareness and lower ethnocentrism. Culture-contrast training methods that highlight similarities and differences between the home and host culture would be most appropriate. Fact-oriented training concentrating on the immediate implications of changes of daily life at home and at work is also useful. During the culture-shocked phase, cross-cultural training would be most effective by providing explanations of actual cross-cultural experiences and provide the tools for sorting out the many experiences and impressions of the host culture. Exercises should let the expatriate experiment with new behaviors to learn how to learn in the new environment. Training methods could include, for instance, role-plays, simulations, and situation exercises where the expatriate is highly involved. In this phase, the expatriate can learn to function efficiently in the new social environment without having to know everything about the host country’s culture. In the conformist phase, cross-cultural training is also suitable, but with a different focus. The training at this phase should focus on learning by doing as the host country nationals do. This interactional learning process could occur through structured or unstructured situations for interaction between expatriates and host nationals and/or experienced expatriates. In the last phase of cross-cultural adjustment, the need for externally administered training is weaker since the expatriate is feeling more at home in the host culture and learns independently without requiring much reflection. Dowling and Schuler (1990) further state that language training for the expatriate and the trailing family should be provided after arrival if important for successful adaptation.

Greater organizational concern about expatriate performance could enhance organizational learning for corporate cross-cultural competence, produce greater acceptance of international assignments, enhance organizational commitment, facilitate repatriation adjustment, and reduce repatriate turnover (Selmer et al, 1998).

2.2.4 Supporting the Trailing Family

It is important to include the trailing spouse in the expatriate support for several reasons. According to Webb and Wright (1996), a vital factor in expatriation success is the ability of the expatriate and the trailing spouse and family to adjust to an unfamiliar foreign culture. Several other authors (see for instance Tung, 1981, 1982; Harvey, 1985) emphasize the ability of the trailing spouse and family to be a crucial determinant of success or failure. Mendenhall and Oddou (1988) even state that the top reason for early returns to be the spouse’s inability to adapt to the foreign environment and culture. While the expatriates have a certain degree of daily routines and social network within the foreign subsidiary, most trailing spouses do not work while overseas and often have more difficulties in establishing social networks and are
therefore more isolated (Harvey, 1985). However, Fish and Wood (1997) state that very few organizations provide either adequate or effective training for an accompanying spouse or partner, mainly because organizations see little benefit in supporting the spouse and are failing to consider this critical aspect of expatriate success.

Black and Gregersen (1991) state that social support from HCNs can help in the spouse’s adjustment since they understand the host culture; can provide information on, and explanations of, the host culture; can provide feedback on the appropriateness of behaviors; and this altogether can serve to reduce uncertainty regarding the general culture and thus facilitating the spouse’s adjustment. This can be achieved by, for instance, assigning the spouse a host-country mentor to fulfill these functions, or help the spouse establishing networks with HCNs.

Fish and Wood (1997) allege that MNCs should help the spouse to adjust to the foreign environment by establishing effective inter-cultural communication networks, and establishment of business involvement either through direct participation in the expatriate assignment or by providing the spouse with job opportunities in the foreign location. Through such activities, spouse adjustment could be enhanced, thus further enhancing the possibilities of expatriation success, less stress on the spouse and the expatriate, and better business image. Dowling and Schuler (1990) further allege that MNCs must understand the affects spouse-related issues can have on career development plans for their international employees.

De Leon and McPartlin (1995) argue that assistance to expatriate children is not sufficiently considered within MNCs. Having enough time to move, meeting other expatriate children, and attending cross-cultural training lead to higher satisfaction with the host country. They suggest that MNCs should arrange family visits to the host country prior to acceptance to decrease children’s reluctance to relocate, formally establish a network through which past, present, and future expatriate children can regularly meet and discuss experiences, and having professional assistance and counseling available both before and during the assignment in case such a need would arise. Further, cross-cultural training for children should continue in the host country. This cross-cultural training should focus on language skills, as well as helping children derive their own explanations of, and insights into, actual experiences in the host country. The objective of such training would be to increase the children’s cultural sensitivity, and teaching them to reserve premature judgment of the culture.

2.3 Repatriation Planning

Baughn (1995) conducted a study with the purpose to assess factors associated with the successful organizational repatriation of personnel returning from expatriate assignments. He states that although one might expect that a returnee from an international assignment, having prior experience in the parent company, would not experience repatriation problems since the expectations regarding the parent company would be accurate, this cannot be taken for granted. The parent organization may have experienced significant changes during the international assignment, such as changes in personnel, policies, projects, and politics that may lead to discrepancies between expectations and actual return experiences. Further, with increasing time on the international assignment, a greater loss of personal contacts and information facilitating reentry is anticipated. Black, Gregersen, and Mendenhall (1992) state that not only changes in home environment have taken place, but also the expatriated
individual has gone through changes. Furthermore, these individual and environmental changes have occurred independently of each other, and since the repatriating employee has had little to no chance to examine the interplay between these changes, they suddenly confront each other upon the individual’s return to the home country. The authors also discuss repatriation adjustment as more difficult than expatriation adjustment since lack of prior experience in the country of the expatriate assignment means that individuals have expectations based on training or stereotypes instead of personal experience, and may thus be more flexible. Repatriates, on the other hand, have experiences of the home country which may lead to more rigid expectations.

According to Baughn (1995), the expatriate’s perceived career relevance of the expatriate assignment is a key predictor of organizational commitment once repatriated into the home organization. Even when guaranteed a reentry into the home-country organizational unit, the right position opening for the returnee may not always coincide with the repatriation date. Often the timing of a repatriation is decided by the length of an expatriate assignment, or the completion of a project, rather than decided with regard to a possible match between the expatriates newly acquired skills and knowledge and a job opening in the parent organization. If the repatriate cannot be provided with a meaningful position for a couple of months upon repatriation, chances are that the returned expatriate will leave the organization. Further, individuals who accept the assignment with the expectation that it would enhance their career prospects may expect a higher level of organizational valuation of their international experience upon return.

2.3.1 Repatriate Support Practices

Lazarova and Caligiuri (2001) studied the role of organizational support practices in keeping repatriates within the organization after repatriation. Their findings indicated that the repatriate’s subjective perception had more influence on the decision to stay within the organization than did objective assessments. The repatriation support practices offered by organizations affect the repatriates’ perceptions of the organization’s overall support, which in turn affect the repatriates’ desire to remain within, or leave, the organization. Both the availability of support practices and their perceived importance for successful repatriation were related to the repatriates’ perceptions of how much the organization values and supports them. In their study, 58 repatriates were questioned about the 11 human resource practices most often associated with successful repatriation. The practices, their mean importance score, and the average availability of these practices are shown in table 2.2 on the following page.

According to the authors, the organization should make an attempt to detail for the expatriate what to expect while on the assignment and what to expect upon return, for instance by having former expatriates brief future expatriates. A written guarantee or agreement could further reduce the uncertainty experienced by expatriates. To further reduce the expatriates concerns regarding his or her future within the company, multiple career planning sessions should be held to discuss the future career of the expatriate. These sessions could include the human resource department, the sending manager, and the business unit manager. Further, organizations could immediately upon return offer the expatriate a reorientation program to brief the returning expatriate on changes such as policies, personnel, and strategy.
2.3.2 Maintaining Communication During Expatriation

Baughn (1995) suggests that many reentry problems following international assignments could be prevented by the development and maintenance of effective communication between the expatriate and the home organization during the expatriate assignment. This would help ensure regular information regarding changes in organizational policies, projects, plans, and staffing. Additional support may include career planning, debriefing programs, and the assignment of a mentor for the expatriate to oversee his or her career positioning during the expatriate assignment. These practices are, according to the author, associated with higher levels of support and acceptance upon return. Ideally, the mentor should be a senior-level individual with connections to find a suitable job for the expatriate upon return. The mentorship should further be formalized, with successful repatriation a measured performance objective. If such a program is not available, the expatriate should try to develop an informal mentoring relationship. The expatriates should also try to maintain personal contact with other members of the organization since turnover and restructuring during the international assignment may result in “lost” contacts. Home visits may also facilitate maintained communication and are particularly important in the months prior to repatriation. Black, Gregersen, and Mendenhall (1992) discuss a function somewhat similar to mentoring, called sponsoring. A sponsor is an individual or an entire department that is assigned to a specific expatriate and is responsible for keeping in touch with the expatriate during the overseas assignment and communicating important information, such as strategic shifts, organizational

<table>
<thead>
<tr>
<th>Repatriation Support Practices</th>
<th>Mean Importance Score*</th>
<th>Average Availability (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-departure briefings on what to expect during repatriation</td>
<td>3.16</td>
<td>45.6</td>
</tr>
<tr>
<td>Career planning sessions</td>
<td>3.57</td>
<td>36.2</td>
</tr>
<tr>
<td>Guarantee/agreement outlining the type of position expatriates will be placed in upon repatriation</td>
<td>3.28</td>
<td>23.2</td>
</tr>
<tr>
<td>Mentoring programs while on assignment</td>
<td>2.96</td>
<td>19.3</td>
</tr>
<tr>
<td>Reorientation program about the changes in the company</td>
<td>2.81</td>
<td>10.3</td>
</tr>
<tr>
<td>Repatriation training seminars on the emotional response following repatriation</td>
<td>2.67</td>
<td>13.8</td>
</tr>
<tr>
<td>Financial counseling and financial/tax assistance</td>
<td>3.17</td>
<td>36.8</td>
</tr>
<tr>
<td>Lifestyle assistance and counseling on changes likely to occur in expatriates’ lifestyles upon return</td>
<td>2.51</td>
<td>17.9</td>
</tr>
<tr>
<td>Continuous communications with the home office</td>
<td>3.38</td>
<td>50.9</td>
</tr>
<tr>
<td>Visible signs that the company values international experience</td>
<td>3.70</td>
<td>28.1</td>
</tr>
<tr>
<td>Communications with the home office about the details of the repatriation process</td>
<td>3.47</td>
<td>46.3</td>
</tr>
</tbody>
</table>

* based on a scale from 0 (not important at all) to 4 (very important)
political changes, or competitor movements, to the expatriate throughout the expatriate assignment.

### 2.3.3 Variables Predicting Repatriation Outcomes

Baughn (1995) further states that the prediction of returnees’ level of commitment to the parent organization and application of knowledge and skills gained on the foreign assignment can be related to characteristics of the international assignment itself in terms of duration of the assignment, the organization’s purpose in sending the individual, the individual’s motivations for accepting the assignment, the extent to which formal and informal linkages were maintained with the domestic firm during the assignment, training for the assignment, and preparation for the return, and; the returnee’s experiences upon return in terms of general support by organizational members, role discretion, and specific support for the use of the skills and perspectives gained during the assignment. These variables and their relationships are shown in figure 2.3 below (broken arrows indicating a negative relationship). The found relationships are also described below, followed by suggested implications of these findings.

<table>
<thead>
<tr>
<th>Assignment Characteristics</th>
<th>Conditions Experienced Upon Return</th>
<th>Repatriation Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Linkages with Domestic Firm</td>
<td>General Support and Acceptance</td>
<td>Commitment</td>
</tr>
<tr>
<td>Personal contact, presence of a mentor in domestic firm, formal preparation for repatriation</td>
<td></td>
<td>Emotional attachment to domestic firm</td>
</tr>
<tr>
<td>Duration of Assignment</td>
<td>Discretion</td>
<td>Career Relevance</td>
</tr>
<tr>
<td>Career Motivation</td>
<td>Autonomy in choosing work methods</td>
<td>Extent to which current domestic assignment fits with career goals</td>
</tr>
<tr>
<td>Extent to which career considerations were an important factor in accepting the international assignment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Development During Assignment</td>
<td>Support for Use of Skills Gained During Assignment</td>
<td>Applications of Skills Gained During Assignment</td>
</tr>
<tr>
<td>Knowledge of foreign environment and business practices, flexibility/adaptability, knowledge of technical and functional operations</td>
<td></td>
<td>Knowledge of foreign environment and business, flexibility/adaptability, technical/functional</td>
</tr>
</tbody>
</table>

![Figure 2.3: Variables Predicting Repatriation Outcomes](source: adapted from Baughn, 1995)

Assignment Characteristics and Conditions Experienced Upon Return

It was found in Baughn’s (1995) study that expatriates who maintained higher levels of linkage with their parent organization during the international assignment tended to experience greater levels of support and acceptance upon return. These linkages could be in the form of personal contact, having a mentor in the parent organization to monitor and keep
the expatriate informed of career-related issues, or specific repatriation planning and information provided by the parent organization. Furthermore, the longer the duration of the assignment, the more the employees saw themselves as having developed new knowledge during the assignment. However, expatriates that had spent a longer period of time on a foreign assignment tended to perceive their new positions back home as having less discretion than did those expatriates who had been on shorter assignments. Employees whose anticipated career advancement was a major reason for accepting the international assignment also tended to report higher levels of learning and development during the foreign assignment. However, they also tended to report lower levels of general support and acceptance upon return. Employees who considered themselves to have significantly developed knowledge and skills on the foreign assignment also reported lower levels of perceived support upon return.

**Conditions Experienced upon Return and Repatriation Outcomes**

The perceived level of support and acceptance upon return was, according to Baughn (1995), directly related to current levels of commitment to the organization. Both the amount of discretion that the employee perceived in the current position and the extent to which the foreign experience was incorporated into the current position led returned expatriates to regard their current position as instrumental in achieving career-related goals. This career relevance was in turn related to organizational commitment. Both discretion and specific support for the transfer of knowledge gained during the foreign assignment were related to the application of such knowledge and skills in the parent organization. As can be seen in figure 2.2, although it is rather complex, organizational commitment is a function of both general support and acceptance upon return (which itself is a function of linkages with the domestic firm during the assignment) as well as the career relevance, which in turn is a function of both discretion and the extent to which the domestic assignment builds on the skills developed abroad.

One of the implications of the study performed by Baughn (1995), is that the organization and the expatriate will most likely benefit by developing ways in which the abilities gained during the foreign assignment can be employed after repatriation. This can be achieved by a formal debriefing or inclusion of the returned expatriate in relevant task forces, committees, or projects. Furthermore, it was found that the expatriates where far more satisfied with their foreign assignment than with the repatriation process. The author therefore suggests that a discussion of the return process should be included in discussion of the foreign assignment prior to acceptance.

### 2.3.4 Repatriation Outcomes and Turnover

Black, Gregersen, and Mendenhall (1992) state that two important outcomes of repatriation adjustment are performance and turnover. Organizations want to keep high performers and are less upset if the lose poor performers. This interface of performance and turnover produces a four-cell matrix as can be seen in figure 2.4. The matrix consists of functional retention – high performers who stay; dysfunctional retention – low performers who stay; functional turnover – low performers who leave, and; dysfunctional turnover – high performers who leave. While both repatriation adjustment and organizational commitment is expected to be positively related to both performance and intent to stay, repatriation work adjustment is expected to be most strongly related to job performance, and organizational commitment is expected to be most strongly related to intent to stay.
### Framework of Repatriation Adjustment

Black, Gregersen, and Mendenhall (1992) have proposed a framework of repatriation adjustment. According to them, repatriation adjustment has three related but distinct facets: adjustment to work, adjustment to interacting with home nationals, and adjustment to the general environment and culture. Further, to the extent that individuals can either imagine or simulate the new environment before actually entering, they can reduce uncertainty and perceived loss of control, and form expectations of how they will be expected to behave. Therefore, the proposed framework consists of both adjustments made prior to return – anticipatory adjustment, and adjustments made after arriving – in-country adjustment. Factors were divided into four categories – individual, job, organizational, and non-work – and were hypothesized to influence the three facets of repatriation adjustment as can be seen in figure 2.5 on the following page.

#### Anticipatory Adjustment

Anticipatory adjustment consists mainly of cognitive adjustments where the individual is trying to form and modify expectations about their new job, social interactions, what things will be like back home, and what the likely consequences will be for various behaviors. It is argued that each facet of anticipatory expectations will have its strongest impact on its corresponding facet of in-country repatriation adjustment. In other words, accurate work expectations would have their most positive relationship with in-country work repatriation adjustment; accurate interaction expectations would have their most positive relationship with in-country interaction repatriation adjustment; and accurate general expectations would have their most positive relationship with general environment repatriation adjustment. However, the longer the individual has been away, and the greater the rate of change in the home country, the greater the possibility that the expectations will be inaccurate. Visits back to the home country during the expatriate assignment might be an important source of information on all facets of life back in the home country, helping the expatriate form more accurate expectations. Further, task interdependency is expected to increase the exchange of information between the expatriate and the home country operations, thereby leading to more

<table>
<thead>
<tr>
<th>Repatriation Adjustment</th>
<th>Organizational Commitment</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>High</strong></td>
<td><strong>High</strong></td>
</tr>
<tr>
<td><strong>Low</strong></td>
<td><strong>Low</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Dysfunctional Turnover</th>
<th>Functional Turnover</th>
</tr>
</thead>
<tbody>
<tr>
<td>High Performance</td>
<td>High Performance</td>
</tr>
<tr>
<td>Low Intention to Stay</td>
<td>High Intention to Stay</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Dysfunctional Retention</th>
<th>Functional Retention</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low Performance</td>
<td>High Performance</td>
</tr>
<tr>
<td>Low Intention to Stay</td>
<td>High Intention to Stay</td>
</tr>
</tbody>
</table>

*Figure 2.4: Repatriation Outcomes*  
*Source: Black et al, 1992*
accurate work expectations. Sufficient pre-return training is expected to have a positive impact on repatriation adjustment. If the training focuses on all three facets, it is expected to affect all of these three facets. Further, having a home country sponsor is expected to have a positive effect on work expectations. Communication frequency is also expected to reduce uncertainty and thus have a positive effect on repatriation adjustment. The content of the communication determines which, and how many, of the three facets are affected.

Although specific anticipatory variables could have direct influences on in-country repatriation adjustment, Black et al (1992) argue that the greatest impact of all these anticipatory variables will be made indirectly through their effect on anticipatory expectations. The more accurate the anticipatory expectations, the easier will be the cognitive and behavioral adjustments necessary for successful repatriation.

In-country Adjustment
The focus during in-country adjustment differs from anticipatory adjustment in that both predictive and behavioral control is emphasized. In addition to know what is expected and what rewards or punishments are likely to be associated with a single action or set of behaviors, successful in-country repatriation also involves exhibiting the appropriate behaviors. Black et al (1992) allege that it is expected that on average greater efforts to gain control would lead to greater actual control, and consequently, greater in-country repatriation adjustment. The greater the individual’s belief that they are capable of gaining behavioral
control and adjusting to the home country environment, the longer they persist at attempting
to make behavioral adjustments and the greater the probability of success in that effort.
Further, the authors state that the higher the degree of adjustment to the foreign assignment,
and the greater the cultural difference between the host and home country, the more negative
the relationship to repatriation adjustment.

Regarding the job variables, three specific variables that are expected to have a significant
impact on job-related uncertainty, and therefore have an influence on repatriation adjustment,
are identified. These variables are role clarity, role discretion, and role conflict as can be seen
in figure 2.5 on page 23. Role clarity concerns the extent to which an individual knows what
is expected from him or her on the job. Role clarity is expected to reduce the uncertainty
associated with the work situation, thus facilitating repatriation work adjustment for the
expatriate. Role discretion concerns the extent to which individuals are allowed to adjust their
work role to fit themselves, making it easier to utilize past, familiar behaviors. Therefore, role
discretion is expected to further reduce uncertainty and consequently facilitate repatriation
work adjustment. The final job variable, role conflict, constituting of conflicting signals about
what is expected of the individual in the new work role, is expected to increase uncertainty
and, thus, inhibit repatriation work adjustment.

Just as pre-departure training and orientation provided by the firm could facilitate adjustment
to the foreign environment, post-return training and orientation could help the repatriate in the
in-country adjustment (Black et al, 1992). Which, and how many, of the three facets are
affected depends on the content of this post-return training. If the content of the training
focuses on all three facets, it is expected to positively affect all three facets. Further, having
clear and congruent organizational and individual repatriation career objectives and
repatriation policies is expected to be positively related to in-country repatriation work
adjustment. Regarding the non-work variables, the authors argue that a downward shift in
social status and poorer housing is negatively related to all facets of repatriation adjustment
since it tend to increase uncertainty. A shift in social status is expected not only to affect
repatriation interaction and general adjustment, but also repatriation work adjustment since
work and social status are often closely linked. Housing conditions are expected to be
primarily related to general repatriation adjustment, less to interaction adjustment, and even
less to work adjustment. Finally, the authors expect spouse repatriation adjustment to be
positively related to expatriate general and interaction repatriation adjustment.

Black et al (1992) further state that it is important to note that some variables that are
proposed to benefit the repatriation process may well inhibit the expatriation process and vice
versa. For instance, while time on the foreign assignment would theoretically facilitate
expatriate adjustment, it would probably make the repatriation adjustment more difficult.
Further, the typical increase in salary associated with foreign assignments tends to increase
the social status and housing conditions of the expatriate. While this may facilitate expatriate
adjustment, the probable downward shift upon returning to the home country is likely to
inhibit the repatriation adjustment.

2.3.6 Components of a Repatriation Program

Tung (1988) points out two problems associated with repatriation as specially essential: career
advancement opportunities and relocation upon return. She further claims that the repatriation
can be particularly disappointing when expected career advancement are not realized, and
when skills and knowledge acquired during the expatriate assignment are not valued by the home organization. Three factors determine the ease or difficulty of finding a suitable place for the repatriate in the home organization according to Tung (1988): duration of the overseas assignment; the overall qualification of the expatriate; and the attitude of top management toward international experience. In order to maximize the possibilities of successful repatriation with regard to career development, the author proposes a repatriation program consisting of the following three components:

1. The institution of a mentor program in which a member of senior management in the home organization has responsibility to assist the expatriate with his or her career development during the expatriation phase. This would reduce the expatriate’s uncertainty regarding career opportunities in the home organization, and allow the expatriate to focus on the expatriate assignment.

2. When a mentoring program is not possible, an organizational unit should be assigned to assist the expatriate with functions beyond those provided by the personnel department. These functions would include:
   - career planning with the expatriate before departure,
   - continuing guidance and/or counseling to help the expatriate keep the career on track with career planning sessions with the expatriate during his or her home visits, and
   - career planning with the expatriate about his or her next assignment six to eight months prior to repatriation.

3. The maintenance of continuous communication between the home office and the expatriate in order to keep the expatriate feel up to date about business back home and make him or her feel part of the home organization.
3 Frame of Reference

In this chapter, the literature presented in the previous chapter will be conceptualized into a frame of reference to be employed as a framework when collecting and analyzing the data needed to answer the research questions stated in chapter one. This chapter will follow the sequential order of the research questions, narrowing down to an emerged frame of reference.

3.1 Career Development

As was stated in the first chapter, the first research question is formulated:

How can Swedish MNCs’ employment of expatriate assignments as a means for career development be characterized?

Some suggestions of important factors regarding career development issues in expatriation were found. The variables selected, and presented below, are perceived to provide with a good overview of the literature reviewed, sufficiently cover the area of research question one, and are believed to be manageable within the boundaries of this study.

Black and Gregersen (1999) state that MNCs managing expatriates successfully have long-term views on expatriation, and employ expatriate assignments with focus on knowledge creation and leadership development. Similarly, Fish and Wood (1994) allege that the linkage between expatriate experience and overall career development must be addressed by MNCs. These statements are to be used as variables for gathering and analyzing data since it will illustrate whether or not the companies to be studied take career development into consideration when sending expatriates.

Black and Gregersen (1999) as well as Fish and Wood (1994) state that it is of crucial importance that both the expatriate and the MNC are clear about the reason for the expatriate assignment and its effects on the overall career of the expatriate. Fish and Wood (1994) further state that it is important that the expatriate know in advance what is expected of them, the level of discretion they will have and in which functional areas, and where they can receive on-going information about their career. These statements will be used to study whether or not the MNCs have clear understandings of the underlying reasons for, and career implications of, expatriate assignments, as well as the actions taken by the MNCs to facilitate for the expatriates such clear understandings.

Both Black and Gregersen (1999) as well as Fish and Wood (1994) state that it is of crucial importance that both the expatriate and the MNC are clear about the reason for the expatriate assignment and its effects on the overall career of the expatriate. Fish and Wood (1994) further state that it is important that the expatriate know in advance what is expected of them, the level of discretion they will have and in which functional areas, and where they can receive on-going information about their career. These statements will be used to study whether or not the MNCs have clear understandings of the underlying reasons for, and career implications of, expatriate assignments, as well as the actions taken by the MNCs to facilitate for the expatriates such clear understandings.

Stahl et al (2002) further discuss that practices such as managing the expatriates’ career expectations, providing career-path information, organizing participation in networking activities that allow expatriates to stay in contact with key individuals in the organization, providing on-going coaching or mentoring, and continuously reviewing performance during the international assignment can facilitate the career-pathing and development of expatriated individuals. Further, Lazarova and Caligiuri (2001) found that expatriates especially consider as important visible signs and demonstrations that the organization values international experience, and that this international experience is beneficial to the individual’s career development. These suggestions will also be included in the frame of reference as they
provide clear proposals of activities to conduct. However, providing career-path information, organizing participation in networking activities, and providing on-going coaching or mentoring are summarized in one variable since they all are perceived to regard provision of on-going career information.

In table 3.1 below, the variables selected from the literature review, and discussed above, are depicted. These variables will serve as a frame of reference when collecting and analyzing the data regarding the incorporation of the expatriate assignment in the overall career plan of the expatriated individual in Swedish MNCs.

<table>
<thead>
<tr>
<th>Table 3.1: Career Development Variables</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Long-term view on expatriation / long-term career planning</td>
</tr>
<tr>
<td>• Focus on knowledge creation and leadership development</td>
</tr>
<tr>
<td>• Clear understanding of the reason for the expatriate assignment</td>
</tr>
<tr>
<td>• Clear understanding of the career implications of the expatriate assignment</td>
</tr>
<tr>
<td>• Managing expectations of the expatriate</td>
</tr>
<tr>
<td>• Provision of on-going career information</td>
</tr>
<tr>
<td>• Continuous review of expatriate performance</td>
</tr>
<tr>
<td>• Demonstrating organizational valuation of international experience</td>
</tr>
</tbody>
</table>

3.2 Expatriate Support

As was stated in the first chapter, research question two is stated:

*How can Swedish MNCs’ expatriate support during the expatriate assignment be characterized?*

Regarding expatriate support practices, specific suggestions were selected from the literature reviewed in order to provide with a frame of reference as broad as possible. These variables are perceived to sufficiently cover the area of research question two, as well as being representative of the literature reviewed.

Dowling and Schuler (1990) as well as Francesco and Gold (1998) discuss financial compensation as an important factor in expatriate management, and table 2.1 on page 13 showed typical types of compensations according to Francesco and Gold (1998). These were: overseas premium; housing allowance; cost-of-living allowance; moving expenses; tuition for dependent education; home leave, and; tax reimbursement payments. These types of compensation benefits were much in accordance to the balance sheet approach discussed by Dowling and Schuler (1990), in which the expatriate salary is based on the individual’s home country salary with additional premiums and incentives. These financial compensations are perceived to provide a wide coverage of expatriate support in the form of financial compensation.

Yurkiewicz and Rosen (1995) argue that providing a mentor helps reduce the “out-of-sight, out-of-mind” concern of many expatriates. Mentoring is, according to Harvey et al (1999) especially important when the expatriate is trying to adjust to the culture shock experienced. They suggest that mentoring specifically serves the functions of providing social support and cultural guidance to the expatriate and the trailing family, as well as helping the expatriate acquire the social knowledge applicable to the global organization. They further allege that
assistance is likely to be needed throughout the expatriate assignment, and that expatriates and the trailing family should be formally assigned to a host-country mentor in addition to a home-country mentor. However, Feldman and Bolino (1999) found that the host country’s culture has a significant impact on how much informal mentoring expatriates receive while on their expatriate assignment, and that the amount of formal pre-departure and post-arrival training also might influence the need for, and effectiveness of, expatriate mentoring.

Black (1992) suggests that post-arrival training during the expatriate assignment may be an effective tool for adjusting expatriates. Further, Selmer et al (1998) suggest that post-arrival cross-cultural training should be offered to the expatriate during the different phases of cultural adjustment, as discussed in section 2.1.3 in the previous chapter. Post-arrival cross-cultural training includes culture-contrast training, fact-oriented training, role-plays, simulations, situation exercises, and interactional training (Ibid). Considering the stated importance of post-arrival training, and the clear proposals stated above, the statements and suggestions above were selected to be used in the frame of reference.

Furthermore, it was also suggested by Dowling and Schuler (1990) to provide on-site language training for the expatriate and the trailing family if necessary for successful adaptation. Fish and Wood (1997) state that most MNCs fail to provide the trailing spouse with adequate training, and considering the statement by Mendenhall and Oddou (1988) that spouses’ culture shocks are a common reason for expatriate failures, family support is perceived to be an important support aspect. Black and Gregersen (1991) suggest that MNCs could provide the spouse with social support by assigning the spouse a host-country mentor or help the spouse establishing networks with HCNs. Similarly, Fish and Wood (1997) propose that the MNCs should help the spouse by establishing effective inter-cultural communication networks, and establishment of business involvement through direct involvement in the expatriate assignment or through providing the spouse with job opportunities in the host country. De Leon and McPartlin (1995) further argue that MNCs should provide more support for the trailing children in the form of establishing a network of past and present expatriate children, having professional assistance and counseling available, as well as providing post-arrival cross-cultural training.

Kraimer et al (2001) state that support services offered by the parent organization during the expatriate assignment are often of more global nature and may include financial benefits to maintain the standard of living, assistance in housing allocation, membership in clubs, rest and relaxation vacation leave, assistance with schooling for children, spousal employment, as well as maintaining the communication with the expatriate during the expatriate assignment. The authors further suggest that the parent company should combine pre-departure and financial support with other support services such as on-going career counseling, psychological counseling, in-country contractual services with one or several persons available in the host country to answer questions that may arise, post-arrival training, or implementation of a formal mentoring program.

In sum, the different support activities propositions found in the literature review suitable for collecting and analyzing data are those depicted in table 3.2 on the following page.
3.3 Repatriation Planning

As was stated in the first chapter, research question three addresses the following:

*How can Swedish MNCs’ repatriation planning be characterized?*

From the literature reviewed, specific suggestions of practices connected to repatriation success have been selected to provide with a framework with which to compare the repatriation planning practices of Swedish MNCs. The variables selected are perceived to well represent the most important aspects of repatriation planning since many of these areas are often discussed and the authors referred to in other literature.

Lazarova and Caligiuri (2001) discussed repatriation practices often associated with successful repatriation. Among these practices were pre-departure briefings on what to expect during repatriation, career planning sessions, guarantee/agreement outlining the type of position expatriates will be placed in upon repatriation, reorientation program about the changes in the company, mentoring programs while on assignment and continuous communication with the home office including communication about the details of the repatriation process. Baughn (1995), Black et al (1992), and Tung (1988) also stress the importance of continuous communication between the expatriate and the home office during the assignment. Baughn (1995) and Tung (1988) discuss the benefits of having a parent company mentor, preferable a member of senior management, to assist the expatriate with career development issues, as well as helping the expatriate find a suitable job in the parent organization upon return. Tung (1988) suggests that when a mentoring program is not available, an organizational unit should be assigned to assist the expatriate with functions such as career planning with the expatriate before departure, continuing guidance and/or counseling to help the expatriate keep the career on track with career planning sessions, and career planning with the expatriate six to eight months prior to repatriation. Black et al (1992)

<table>
<thead>
<tr>
<th>Type of Support</th>
<th>Support Practices</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Financial Compensation</strong></td>
<td>overseas premium, housing allowance, cost-of-living allowance, moving expenses, tuition for children’s education, home leave, tax reimbursement payments</td>
</tr>
<tr>
<td><strong>Formal Mentoring</strong></td>
<td>home-country mentor, host-country mentor (for expatriate and/or spouse)</td>
</tr>
<tr>
<td><strong>Post-Arrival Training</strong></td>
<td>cross-cultural training (culture-contrast training, fact-oriented training, role-plays, simulations, situation exercises, interactional training, different training employed in different phases), on-site language training</td>
</tr>
<tr>
<td><strong>Support of Trailing Family</strong></td>
<td>host-country mentor, HCN network, involvement in expatriate assignment, job opportunity, expatriate children network, professional assistance and counseling for expatriate children, post-arrival CCT for expatriate family, assistance with schooling for children</td>
</tr>
<tr>
<td><strong>Miscellaneous</strong></td>
<td>assistance in housing allocation, membership in clubs, rest and relaxation vacation leave, maintained communication during assignment, on-going career counseling, psychological counseling, in-country contractual services with one or several persons available in the host country to answer questions that may arise</td>
</tr>
</tbody>
</table>

Table 3.2: Support Variables
discuss a rather similar function, sponsoring, in which an entire department is assigned to the expatriate and is responsible for providing the expatriate with important information during the assignment. Other repatriation support practices include home visits during the expatriate assignment and pre-return training (Baughn, 1995; Black et al, 1992).

According to Baughn (1995), communication with the parent organization and the career relevance of the expatriate assignment are strong contributors to organizational commitment upon repatriation. Further, Black et al (1992) state that the more accurate expectations the expatriate has of the repatriation, the easier will be the adjustments necessary for successful repatriation. The parent organization can facilitate accurate expectations by preparing the repatriation so that the individual know what is expected from him or her on the job, allow for the individual to adjust the work role to better fit the acquired skills and knowledge, and by reducing conflicting signals of organizational expectations. Further, having clear and congruent organizational and individual repatriation career objectives and repatriation policies is expected to ease the repatriation process. The authors further state that it is important to note that some practices facilitating expatriate adjustment may very well inhibit the repatriation process. For instance, while increased financial benefits and housing conditions may facilitate adjustment, the probable downward shift upon returning to the home country is likely to inhibit the repatriation adjustment.

The repatriation planning practices proposed in theory to be associated with successful repatriation and found suitable for data gathering and analysis are depicted in table 3.3 below.

Table 3.3: Repatriation Planning Variables

- Pre-departure briefings on what to expect upon repatriation
- Career planning sessions before departure and 6-8 months prior to repatriation
- Parent company mentoring
- Continuous communication between home office and expatriate
- Assigned organizational unit to provide continuous career guidance
- Home visits during the assignment
- Pre-return training
- Guarantee/agreement outlining the type of position expatriates will be placed in upon repatriation
- Reorientation program about the changes in the company

3.4 Emerged Frame of Reference

In figure 3.1 on the following page, the research area of this study is depicted in an emerged frame of reference. As can be seen in the figure, the study derives from an organizational perspective and aims toward an understanding of the role of the expatriate assignment in the overall career development of the expatriated individual, the expatriate support provided during the period abroad, as well as the repatriation planning practices conducted by the MNC home office. Even though some repatriation planning occurs prior to departure, repatriation planning is depicted to occur during the expatriate assignment since most activities are predicted to be executed during this phase.

The areas of career development, expatriate support, and repatriation planning are further perceived to be interrelated. The more emphasis of the expatriate assignment on the overall
career development of the expatriated individual, the more support and rigorous repatriation planning is expected to be provided. For instance, if the expatriate assignment is an important part of the career development plan of the expatriated individual, the MNC home office should be more likely to uphold frequent communication with the expatriate to monitor and support the progress. This frequent communication would, in turn, facilitate the repatriation planning and lead to more accurate repatriation expectations of both the MNC home office and the expatriate. More accurate expectations would probably lead to a more successful repatriation and, thus, career development.

Figure 3.1: Emerged Frame of Reference
4 Methodology

In this chapter the research methods available regarding purpose of research, research approach, research strategy, data collection method, sample selection, analysis of data, and quality standards will be described, and the specific methods selected will be motivated.

4.1 Purpose of Research

According to Zikmund (2000), research can be classified based on the purpose of the research. Depending on the nature of the problem, the research will be exploratory, descriptive, or causal (ibid).

Zikmund (2000) explains that exploratory studies are conducted to clarify the nature of vague problems. He further alleges that exploratory research is usually performed as an initial research, where further research is needed in order to provide conclusive evidence. Wallén (1996) suggests that exploratory research is an appropriate approach to use when the researcher is uncertain which theories are relevant and when important characteristics and relations are hard to determine. According to Zikmund (2000), descriptive studies are, unlike exploratory research, based on some previous understanding of the nature of the research problem and are aimed to describe characteristics of a population or phenomenon. According to Wallén (1996), descriptive research is suitable when the problem is clearly structured but the intentions are not to establish connections between causes and symptoms. He further states that descriptive research demands that the researcher knows what to look for but does not know the answers. Zikmund (2000) describes causal research as “research conducted to identify cause-and-effect relationships among variables where the research problem has already been narrowly defined” (2000, p.51). This type of research is normally preceded by exploratory and descriptive research (ibid).

The research purpose of this study is of descriptive nature since literature has been found regarding the research area providing a previous understanding of the nature of the research problem, and also since the aim is to describe the characteristics of this phenomenon in a Swedish setting. However, since no literature was found explicitly focusing on a Swedish population, the research purpose is also exploratory in that the applicability of the literature reviewed on a Swedish population is uncertain. Finally, considering the fact that no literature was found explicitly focusing on Swedish MNCs, variables not predicted are likely to be found further warranting exploratory research.

4.2 Research Approach

Zikmund (2000) discusses two sets of research approaches available – deductive versus inductive and qualitative versus quantitative.
4.2.1 Deductive versus Inductive

Zikmund (2000, p. 43) defines deductive reasoning as: “the logical proves of deriving a conclusion from a known premise or something known to be true”. Zikmund (2000, p. 43) further describes inductive reasoning as: “the logical process of establishing a general proposition on the basis of observation of particular facts”. Wallén (1996) describes inductive research as starting in collecting data, and from the material collected try to draw theoretical conclusions. The research performed in this study started with a literature review, emerging in a frame of reference from which to base the data collection and compare empirical findings. The study can therefore be said to emanate from alleged premises, and hence, is deductive.

4.2.2 Qualitative versus Quantitative

Zikmund (2000) further explains that qualitative research is subjective in nature, as opposed to quantitative research that determines the quantity or extent of an outcome in numbers and provides an exact measurement approach. According to Holme and Solvang (1991), the defined research problem and the data needed in order to solve this problem naturally decides which research approach to select.

The purpose of qualitative research is, according to Wallén (1996), to examine the characteristics of a phenomenon and how to identify it. Holme and Solvang (1991) state that qualitative research involves gathering, analyzing, and interpreting data not possible to quantify. Wallén (1996) describes data that cannot be quantified as vague problems with various meaning that is subjective, such as feelings and experiences. Further, Holme and Solvang (1991) state that a qualitative approach is characterized by a great closeness to the respondent or source and intends to capture these individuals’ or other sources’ values, attitudes, and perceptions regarding the investigated area. Therefore the researcher strives to obtain a complete understanding and overview of the problem or situation rather than just focusing on specific variables (ibid).

Quantitative research, on the other hand, is a research approach that is formalized and highly structured (Holme & Solvang, 1991). This approach enables the researcher to create universal generalizations through studying specific variables on a vast number of objects of investigation (ibid). The authors further allege that statistical methods are used to measure all variables, since information is presented as numerical data and thus easy to present in figures. They finally state that selectivity and distance between the researcher and the source is a clear character of quantitative approach.

Expatriate management and the role of expatriate assignments in career development in Swedish MNCs is a rather complicated and complex phenomenon, and therefore a qualitative study comes as a natural selection regarding research approach when aiming at gaining a deeper understanding of this phenomenon. Further, this study does not aim at drawing any statistical generalizations. Rather, it aims to gain a deeper understanding of how this phenomenon can be characterized. Therefore, by concentrating on a relatively small number of cases, it is possible to more deeply explore the area of research and thus better reach the understanding desired in the purpose. Thus, in order to gain the required understanding and knowledge of the research area, this study solely used a qualitative research approach.
4.3 Research Strategy

Yin (1994) recognizes five different research strategies to use when collecting and analyzing empirical evidence, and provides three conditions to determine which strategy to use. The five different strategies are displayed in non-hierarchical order in table 4.1 together with their relations to the three conditions suggested by the author. According to Yin (1994), each strategy can be used for exploratory, descriptive, or explanatory (casual) research purposes.

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Form of research question</th>
<th>Requires control over behavioral events?</th>
<th>Focuses on contemporary events?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Experiment</td>
<td>how, why</td>
<td>yes</td>
<td>yes</td>
</tr>
<tr>
<td>Survey</td>
<td>who, what, where, how many, how much</td>
<td>no</td>
<td>yes</td>
</tr>
<tr>
<td>Archival analysis</td>
<td>who, what, where, how many, how much</td>
<td>no</td>
<td>yes/no</td>
</tr>
<tr>
<td>History</td>
<td>how, why</td>
<td>no</td>
<td>no</td>
</tr>
<tr>
<td>Case study</td>
<td>how, why</td>
<td>no</td>
<td>yes</td>
</tr>
</tbody>
</table>

Yin (1994) states that the type of research question is the most important condition when selecting research strategy. He further alleges that “how” and “why” questions are likely to favor the employment of experiments, histories, or case studies. Since the purpose of this study is to gain an understanding of Swedish MNCs’ use of expatriate assignments for individual career development, the research questions was formulated as “how” questions in order to reach a deeper understanding of the phenomenon. By adopting such questions, too narrow empirical evidence excluding variables not found in earlier research can be avoided. Further, by adopting this type of research questions, survey and archival analysis are ruled out, narrowing down the suitable research strategy alternatives suggested by Yin (1994) to experiments, histories, or case studies. When determining which of these three research strategies to use, the remaining two conditions – control over behavioral events and focus on contemporary events – serve as helpful guidelines.

Yin (1994) describes experiments as possible when an investigator is able to focus on one or two isolated variables and can manipulate behavior directly, precisely, and systematically. Since this is not the case with the research performed in this study, where variables are several and not necessarily covered by earlier research and cannot be manipulated by the researchers of this study, an experiment strategy is excluded. The author further explains historical research as dealing with the past, when no relevant persons are alive to report, and where an investigator must rely on documents and cultural and physical artifacts as the main sources of evidence. Due to the contemporary nature of the research problem stated in this study, history is also excluded as a suitable strategy, leaving only case studies to employ. Case study techniques have much in common with the techniques used in historical researches, but add two sources of information not usually possible in historical research – direct observations and interviews (Yin, 1994).
Yin (1994) portrays case studies as preferred when examining contemporary events with no ability to manipulate behavioral events, and further describes the ability to deal with a full variety of evidence, including documents, artifacts, interviews, and observations as the unique strength of a case study. Considering the “how” character of the research questions, and the fact that the intention of this study is to gain an understanding of a contemporary phenomenon with no control by the researchers over the behavioral events that has resulted in this phenomenon, a case study strategy is found not only the single one strategy remaining, but also the most suitable and is therefore selected as the research strategy adopted for the research performed in this study.

Yin (1994) states that case studies can either be single-case or multiple-case studies. They can further be described either in narrative form or by a composition of a series of questions and answers. A single-case study investigates one entity in depth, while a multiple-case study involves two or more cases (ibid). As stated by Herriott and Firestone (1983) in Yin (1994), using a multiple-case approach allows the researcher to compare the cases studied, in a cross-case analysis, so that a higher level of understanding can be reached. He further states that evidence from multiple-case studies is often considered as more compelling than evidence found in single-case studies, and that the multiple-case study therefore is regarded as more robust. Taking the advantages of a multiple-case study into consideration, a multiple-case research strategy was used in this study, which were described in a narrative form.

4.4 Data Collection Method

Yin (1994) discusses six major sources of evidence to use in a case study. An overview of these six sources is provided in table 4.2 on the following page, together with their strengths and weaknesses. According to Yin (1994), documentary information is likely to be relevant to nearly every case study topic, especially to confirm and supplement evidence from other sources. He further states that documents play an important role in data collection for case studies due to their overall value, but care must be taken not to misinterpret documents since they are written for some specific purpose and some specific audience other than the research being done by the researcher for the case study. The author further points towards the same precautions regarding archival records, whose usefulness differs from case to case. He also warns that even if archival records may be highly quantitative, these numbers should not be mistaken for a sign of accuracy. Conducting direct observations implies visiting the site of study allowing the researcher to observe relevant behaviors or environmental conditions in reality. Participation observation differs from direct observation in that it implies not only observing for instance a production line, but to actually participate in the production in order to gain a wider understanding of the field of research. Physical artifacts are actual things collected from the site visited in order to analyze and draw conclusions from it, an approach extensively used in anthropological research.

Yin (1994) states interviews as one of the most important sources of case study information. According to Wiedersheim-Paul and Eriksson (1997), interviews allows for interaction between the interviewer and the respondents. Further, Holme and Solvang (1991) argue that interviews are ideal when in-depth information is preferred and that it allows flexibility and closeness to the respondents, which is important when conducting qualitative studies. Yin (1994) further states that an interview is a two-way conversation giving the interviewer a possibility to actively participate in the interview. Considering the benefits of interviews in
case studies, as discussed above, interviews was selected as data collection method for this study.

Table 4.2: Six Sources of Evidence: Strengths and Weaknesses  

<table>
<thead>
<tr>
<th>Source of Evidence</th>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
</table>
| Documentation      | - stable – can be reviewed repeatedly  
|                    | - unobtrusive – not created as a result of the case study  
|                    | - exact – contains exact names, references, and details of an event  
|                    | - broad coverage – long span of time, many events, and many settings  
|                    | (Same as above for documentation)  
|                    | precise and quantitative  
|                    | reality-covers events in real time  
|                    | contextual-covers context of event  
|                    | (Same as above for direct observations)  
|                    | insightful into interpersonal behavior and motives  
|                    | insightful into cultural features  
|                    | insightful into technical operations  
| Archival Records   | - (Same as above for documentation)  
|                    | - accessibility due to privacy reasons |
| Interviews         | - targeted – focuses directly on case study topic  
|                    | - insightful – provides perceived causal inference  
|                    | - precise and quantitative |
| Direct Observations| - time-consuming  
|                    | - selectivity – unless broad coverage  
|                    | - reflexivity – event may proceed differently because it is being observed  
|                    | - cost – hours needed by human observers  
| Participant-Observation | - (Same as above for direct observations)  
| | - bias due to investigator’s manipulation of events |
| Physical Artifacts  | - selectivity  
|                    | - availability |

Yin (1994) continues by stating that interviews can be based on three different strategies; open-ended interviews, focused interview, and a structured interview following a line of a formal survey. Most commonly used in case study research is the open-ended interview, a strategy where the interview does not follow any structured questions, allowing the respondent to provide both facts and personal opinions regarding a certain matter. This kind of interview is rather time consuming and the interviewer merely guides the respondent through an outline of predetermined areas of discussion. In a focused interview the respondent is interviewed for a shorter period of time, and the interview are more likely to follow a set outline of questions. However, the interview may still be of open-ended nature, conducted in a conversational manner. The third and last type of interview is the structured interview, which follows a strict set of pre-determined questions, to be compared with a formal survey.
The interviews in this study followed an open-ended interview strategy with the area of the research questions serving as areas of discussion. The interview guide in Appendix A served as a checklist to reassure that no important data was left out during the interviews, rather than as a strict outline of questions. In order to avoid biased answers, the interview guide was not sent to the respondents in advance. However, general information about the research area as discussed in the frame of reference was communicated to the respondents in advance to help them prepare for the interviews. By doing this, both the respondents’ broad knowledge about the area could be captured, as well as knowledge of the more detailed areas discussed in the frame of reference. This further correlates with the exploratory and descriptive purpose of this study. The interviews ended by reassuring no questions were left out and making sure that if any additional questions should arise, the respondents were to be contacted again so that the purpose of the study could be fully answered. Face-to-face interviews were employed due to advantages such as being able to read non-verbal cues of the respondents, greater opportunities of probing, and perceived facilitating of full cooperation of the respondents.

Even though interviews are the primary source of evidence for the cases in this study, documentation was used as a secondary source of evidence. For documentation, websites were used for collecting company background data, as well as corporate documents provided during the interviews.

**4.5 Sample Selection**

The multiple-case study performed was based on four interviews with a total of six respondents in four different Swedish MNCs. A sample of four case companies was selected in order to receive sufficient data to reach the purpose of the study, and still having a sample size manageable within the scope of the study resources. Since the research purpose of this study was to gain an understanding of Swedish MNCs’ use of expatriate assignments for individual career development, ten of the largest and most well known Swedish MNCs were contacted since they were, due to their size and scope of operations, perceived to have the experience of expatriate management needed to provide sufficient data relevant to the study. The initial contacts were made by telephone, and the research area was discussed with employees holding positions related to the area of research to investigate the interest of these MNCs to provide the data needed for this study. Interviews were thereafter held with respondents within the four Swedish MNCs showing the most interest in participating in the study: the Electrolux Group, Scania, the Volvo Group, and the SKF Group.

According to Holme and Solvang (1991), it is important to get in contact with the respondents with the right knowledge in order for the results of the study not to be invalid or worthless. In order to minimize the risk of selecting respondents with insufficient knowledge of the area of research, the respondents were selected by the initial contact persons in these MNCs after having discussed the research area. At the Electrolux Group, Torild Melki, working at Compensation & Benefits at HR Organizational and Staff at Electrolux headquarters, was interviewed. At Scania headquarters, Jonas Tallroth, Manager of International Assignments, and Maria Westerlund, Area Manager within International Assignments, were interviewed. At Volvo headquarters, Anders Friman, developer at Center of Expertise, Expatriate Management, was interviewed. Finally, at SKF headquarters, Inger Vickhoff, Management Compensation & International Assignments, and Jenny Julin, HR Services at SKF Sweden,
were interviewed. All four interviews were held during the 9th and 10th of December 2002, and lasted between one and two hours.

4.6 Analysis of Data

Yin (1994) alleges that a researcher, before analyzing the data of a case study, can choose between two general analytical strategies. The researcher can either employ a strategy relying on theoretical propositions, in which data is gathered based on, and compared to, earlier findings, or employ a strategy developing a case description. The latter strategy is, according to Yin (1994, p.104) “… less preferable than the use of theoretical propositions but serves as an alternative when theoretical propositions are absent”. Following this proposition by Yin (1994), this study employs a strategy relying on theoretical propositions since relevant theory regarding the area of research of this study has been found.

According to Miles and Huberman (1994), the researchers’ intention when analyzing qualitative data from interviews is to make sense of the words collected. They further state that the analysis can be divided into three sequential stages; data reduction, data display, and conclusions drawing/verifications. During the data reduction stage the researcher selects, focuses, simplifies, abstracts, and transforms the data, with the purpose of organizing it so that final conclusions can be drawn and verified. This is followed up in the data display stage by the researcher who takes the reduced data and displays it in an organized and clear way in order to draw conclusions more easily. In the third and last stage, conclusions drawing/verification, the researcher selects attributes to the reduced and displayed data, noting regularities, patterns, explanations, possible configurations, causal flows, and propositions. The analysis of the data in this study is conducted in the way presented above. The empirical data collected from each case were reduced and compared, in within-case analyses, to the concepts stated in the frame of reference. As discussed in section 4.3, Herriott and Firestone (1983) stated in Yin (1994) that a cross-case analysis is suitable for reaching a higher level of understanding. Hence, a cross-case analysis was conducted with the aim of comparing the four cases with each other in order to find similarities and differences between the cases. In order to display the reduced data as clear as possible, tables summarizing both within-case analyses and the cross-case analysis were included in corresponding sections.

4.7 Quality Standards

Yin (1994) suggests four tests when determining the quality standards of a case study research, as depicted in table 4.3 on the following page. These tests include construct validity, internal validity, external validity, and reliability. He further states that internal validity is a concern only for causal (or explanatory) research, trying to determine cause – effect relationships. Internal validity is therefore ruled out as a quality standard of this study since no such determinations are aimed for.
4.7.1 Construct Validity

Yin (1994) alleges that construct validity concerns using the correct operational measures for the concepts being studied. It regards whether the researcher has succeeded to develop an operational set of measures, as well as how subjective judgments have been avoided in the data collection procedure. Yin (1994) discusses tactics available in order to increase construct validity. One is to use multiple sources of evidence during the data collection procedure. Another is to establish a chain of evidence to allow the reader of the case study to follow the derivation of any findings from the question stated to the respondent to the conclusion drawn from it. The third tactic proposed by Yin (1994) is to have key informants review the draft case study report. This can be done by having participants and informants in the case reviewing the draft report (Ibid).

Multiple sources of evidence were used in the form of interview respondents, corporate documents, and corporate websites. In order to assure that the respondents with the right competence were selected, the selected MNCs were asked to appoint suitable respondents after having been informed about the research area. The respondents interviewed in all four cases held similar area of responsibilities, although different titles. In two of the cases, two respondents were present during the interview since the practical and strategic aspects of the research area are handled by different positions in those MNCs. Corresponding competence of respondents is perceived to have been achieved since the representatives of the four MNCs in a cooperation between the largest Swedish MNCs, dealing with issues regarding the area of research in this study, were present during the interviews. Strong chains of evidence have been strived for by continuous citations to earlier research and carefully explained every step taken from the establishment of research purpose and questions to conclusions. Furthermore, the interview guide was read and commented upon by the supervisor of this study, and certain clarifications made prior to the interviews according to the comments received. The
interviews were recorded to reduce the risk of missing vital information. However, there is a risk of translating errors since the interviews where held in Swedish, and data gathered translated into English. To avoid such mistakes, the respondents were sent the data presentation of their interview to proof-read the translation. This would also prevent any type of misinterpretations of the data gathered. Furthermore, the respondents were to be contacted again if the need for any follow-up questions should arise. Finally, case study drafts have been reviewed by the supervisor of the study as well as peer students.

4.7.2 External Validity
External validity is defined by Zikmund (2000, p.253) as “[t]he ability of an experiment to generalize the results to the external environment”. Further, Yin (1994, p.35) states that external validity “…deals with the problem of knowing whether a study’s findings are generalizable beyond the immediate case study”. However, generalizations can, according to Yin (1994) be either statistical or analytical. Statistical generalizations should, according to the author, not be the aim of case studies since this would require a large number of relevant variables and an impossibly large number of cases. Case studies rely on analytical generalization, in which the investigator is striving to generalize a particular set of results to some broader theory (Ibid). Replication logic in multiple-case studies should be utilized, where relevant theory should be tested in similar surroundings, and similar results should occur in order to support the theory (Ibid). By studying four cases, with respondents having similar areas of responsibility, the external validity is considered increased.

4.7.3 Reliability
Zikmund (2000, p. 280) defines reliability as “the degree to which measures are free form errors and therefore yield consistent results”. Similarly, Yin (1994) states the goal of reliability to be minimizing of errors and biases in a study. If a researcher is to repeat the exact procedure and research as described from an earlier researcher, he or she should arrive at the same results and should also able to draw the same conclusions (Yin, 1994). The research of the study should therefore be conducted so that another researcher could repeat the procedure (Ibid). A high reliability was attempted to be reached by carefully explaining every step taken in each chapter. Furthermore, a structured approach has been adopted, in which chapters are based on the previous one, making it easier for readers and other researchers to follow the logical structure and flow when reading or using in future research. The same interview guide was also used in all four interviews. Conducting interviews always includes the risk of including personal biases to some extent. To minimize the risk of such personal biases, the respondents were given the opportunity to comment upon the data presentation prior to analysis.

During the analysis, there is a risk that a few of the variables have been incorrectly analyzed in certain cases since those variables were not specifically asked for. Hence, data perceived by the respondents to be important to provide might have influenced the matching of certain variables. However, this is not perceived to have affected the findings and conclusions drawn in this study since important variables were specifically probed for, if not mentioned by the respondents on own initiative.
4.8 Summary of Methodology

Figure 4.1 below provides a visualization of the discussion above, showing the methodological path select for this study.

- **Purpose of Research**
  - Exploratory
  - Descriptive
  - Casual

- **Research Approach**
  - Deductive
  - Inductive
  - Qualitative
  - Quantitative

- **Research Strategy**
  - Experiment
  - Survey
  - Archival Analysis
  - History
  - Case Study

- **Data Collection Method**
  - Documentation
  - Archival Records
  - Interviews
  - Direct Observations
  - Participant Observations
  - Physical Artifacts

- **Sample Selection**
  - Multiple-cases
  - Four Swedish MNCs in three different industries
  - The Electrolux Group; Scania; the Volvo Group; the SKF Group
  - Respondents holding similar areas of responsibility

- **Analysis of Data**
  - Within-Case Analyses
  - Cross-Case Analyses

- **Quality Standards**
  - Construct Validity
  - External Validity
  - Reliability
5 Data Presentation

In this chapter, the data collected from the four cases will be presented case by case. Each case will be initiated with general background information, as well as background information regarding expatriations, before dealing with the areas of the research questions. Each case will further be ended with the respondents’ reflections regarding their expatriate management compared to other, mainly Swedish, MNCs.

5.1 Case One: The Electrolux Group

With sales of SEK 135.8 billion in 2001, Electrolux is the world’s largest producer of appliances and equipment for kitchen, cleaning, and outdoor use, and one of the world’s largest producer of similar equipment for professional users (Electrolux Investor Relations, 2002). The Electrolux Group has two business areas: Consumer Durables and Professional Products, both of which include products for indoor and outdoor use. Among the brands of the Electrolux Group are, besides Electrolux, well-known brands such as AEG, Zanussi, and Husqvarna. More than 55 million Electrolux Group products are sold each year in more than 150 countries worldwide (Electrolux Corporate, 2002). The Electrolux Group headquarters are located in Stockholm, Sweden.

The respondent works at a department called HR Organizational Staff. Within this department are two groupings: Compensation and Benefits, in which the respondent works, and Talent Management. The respondent is specifically responsible for international assignments with duration from one year, even though the department is sometimes asked to help with assignments ranging from six months. The respondent has worked within this area for ten years at Ericsson, a couple of years as a consultant, and then six years at Electrolux.

There are approximately 200 expatriates within seven different business units in Electrolux, a figure that has been rather stable over the last couple of years. Approximately 15 per cent of all expatriates are female. Electrolux employs in total about 86,000 people. The expatriates are sent to about 30 countries in all parts of the world, except for the Middle East. The average age for an expatriate is, according to a recent survey, 41.5 years, and the expatriates within Electrolux usually have three children. Most expatriates, presently 60, are sent to the company center in Brussels. 20 of these expatriates have not moved with their families, but are traveling on a weekly basis. Area of responsibility and positions of the expatriates varies widely from country managers, financial managers, controllers, developers, designers, and young marketers. The typical assignment last two to three years before the expatriate is repatriated into the home country organization, even though quite a few expatriates move on to new international assignments. Electrolux has also, especially during the 90s, bought up companies in other countries, and is therefore sending expatriates for organizational structuring purposes, as well as sending inpatriates to headquarters in order to educate personnel at the newly acquired subsidiaries of the business culture and procedures of Electrolux.

Expatriate failures are not perceived as a big problem at Electrolux. Those failures that occur would according to the respondent probably occur even if the individual was still in the home
organization. Failures are though rather low since Electrolux is present mainly in industrialized countries, were there is a demand for their products, and since most expatriates have previous work experiences in other countries and cultures. Even though the expatriate is known to function well in other countries, it is of vital importance to meet with the family prior to making a decision to see whether or not the family is likely to manage the international transfer, as well as finding out for how long time the family is prepared to live abroad. If the family cannot live comfortably in another country, it would cause problems for the expatriate’s job performance as well. However, the respondent believes the literature overemphasizes the rate of expatriate failures. The reason that Electrolux has low failure rate is that they are very conscious of costs and do not send expatriates if there are a HCN that can do the job for one third of the cost. There are two criterions that have to be fulfilled when sending an expatriate: the contract must specify the time limit of the assignment, and a position should only be filled with an expatriate if there are no suitable HCN available. The decision to send an expatriate, and the selection of the expatriate, is carefully considered in advance. The challenge of expatriate management is to keep the repatriated individuals within the company. Unfortunately, some repatriates leave the organization because they are not placed in a suitable position immediately upon return. Further, there are in many cases no jobs to return to in the home organization due to organizational restructuring. In those cases, the expatriate has to remain in their host country, or move on to an assignment in another country. Two years ago, 50 per cent of all expatriates within Electrolux were Swedes, today that figure has decreased to approximately 30 to 35 per cent, and is anticipated to decline even further. Since a large part of Swedish operations have been moved overseas, Electrolux has lost some repatriated Swedes since no suitable jobs were available to them in Sweden. The respondent states that a successful expatriate assignment includes keeping the repatriate within the organization upon return. However, the expatriate failures according to this definition have lately not been over six per cent within Electrolux, which is still considered a high number.

5.1.1 Career Development

Electrolux has a rather short-term view on expatriation, in which expatriates are sent to fill a current business need. However, the respondent believes the expatriates to gain from an expatriate assignment both professionally and personally. In some cases, though, the selection decision is based on a combination of business need and career development, but individuals are rarely sent for development reasons only. However, since the establishment of Talent Management, career development has increasingly gained importance when selecting an expatriate. Efforts are made to assess the competences of the staff and make an inventory of human resources to be able to spot need for individual development and provide possibilities for such development. In order for this to function, Electrolux need a better repatriation planning to prevent the loss of repatriated individuals. The respondent also state it necessary to shorten the time on every position, which today often is five years, in order to increase the experiences of all personnel. It is therefore important that individuals are transferred both between countries and business units in order to get an organizational perspective, which does not work entirely with satisfaction today.

Since Electrolux is a multinational corporation with a lot of cross-border operations, experience of international assignment is stated to be a necessity in order to reach the higher organizational positions. Regarding the expatriates’ expectations of career implications of an expatriate assignment, the respondent state the expatriates to be aware of the business need, but also of their value to the organization since only the most suited employees are sent as
expatriates. The responsibility to discuss career implications usually lies on the expatriate and his or her line manager, even though the respondent tries to discuss this issue with Swedish expatriates during the overall expatriation discussions. Evaluation and monitoring of expatriate performance is handled by the sending line organization and the sending business unit’s HR department.

Electrolux has an Intranet website in which available positions are posted for application. On this website, extensive information is published about the position and its responsibilities. Individuals can also subscribe to information via e-mail regarding certain positions or countries of interest. This has not only facilitated the identification of suitable candidates through self-nomination, but has also led to an increased exchange between countries that is expected to increase even more in the near future.

5.1.2 Expatriate Support

Electrolux usually pays market-based salaries to the expatriates. However, this is not possible in some situations. For instance, if an American or Swiss expatriate used to higher salaries is sent to Sweden or other countries with lower market salaries, the salary has to be based on the home-country salary. The respondent states the expatriates within Electrolux to be generally satisfied with the expatriate package, even though some expatriates wish to have higher salary premiums. However, Electrolux prefer to base the salary on the job to be performed, and instead of providing high premiums offer more cost coverage for the expatriate, such as coverage of extra taxes and similar expenses. Free housing is always included in the compensation package regardless of which salary system is used. Moving expenses and storage for furniture and home equipment to be left in the home country are always paid by the company. Compensations other than increased salary is also preferred due to taxation advantages. The last couple of years, Electrolux has been working on reducing the costs of expatriate compensation without reducing the net benefits for the expatriates by restructuring to less taxable benefits. Electrolux has a policy specifying the compensation benefits of expatriates. Such benefits include for instance spouse funding consisting of a saving account in which the company place an annual percentage to be used either as pension savings or as a capital to be used after the assignment. Electrolux also provides with international schools for trailing children, but only when deemed necessary since the costs of international schools range from SEK 75,000 to 100,000 per year and child. Electrolux provides one home visit per year and family member. If the expatriate has children left in the home country, the company provides the family with travel expenses so that the family can meet three times every year. For expatriates that have chosen to travel back and forth instead of moving to the host country, Electrolux pays for the traveling expenses since this is often more cost efficient. The costly aspects of an expatriation are mainly to uphold a pension level similar to the one in the home country, moving expenses, and housing costs. For an assignment that lasts two to three years, the company compensates the individual in order to uphold the pension level.

Added to these costs are sometimes taxes and social costs that make the benefits cost more than the expatriate receive. This also cause a perception in the receiving organization that the expatriates are better off than they actually are, since the host country organization only sees the tremendous costs of the expatriate, and not the actual net salary and benefits for the expatriate. Efforts need to be made to clarify and increase understanding of the extra expenses. However, due to the high visible costs of expatriates, the expatriates are faced with high performance requirements in order to justify such expenses.
Electrolux do not have, and never has had, a formal mentoring program. It is rather the closest supervisor that is responsible for keeping in touch with the expatriate. Further, the HR managers within each business unit are also involved in the communication with, and evaluation of, expatriates. These organizational initiatives are seen as sufficient since the number of expatriates is rather low, and therefore, a mentoring program is not considered necessary. The company encourages expatriates to visit the home organization during home visits, however, this is not a formal demand and no specific activities are planned.

Post-arrival cross-cultural training is often discussed and offered. However, it is not widely used due to difficulties to make line managers aware of the benefits, high costs of consultants, and lack of time of the expatriate. Some expatriates have further stated that such training did not contribute to increased cross-cultural competence. In other cases, practical issues make timing of the training difficult to match with the need of the expatriates and the trailing families.

Leadership training in cultural differences at work is also offered to expatriates filling a managerial position prior to expatriation. The company also has an international leadership training course every year within the company, which is offered to individuals selected for expatriate assignments, as well as to potential candidates for future expatriate assignments. For expatriates that have not had such in-house training, or when additional training is needed, consultant firms are hired to provide such training. It is further important to inform the host country organization about, and clarify the need and reason for, the expatriate assignment in order to avoid disapproval in the host organization.

Language training is always offered to expatriates and their families in both the home and host country. Home country language training is most often used in the form of an intensive course to freshen up previous acquired skills in the specific language. However, if the language is completely new to the expatriate, initial language training is usually not provided in the home country. The amount of language training is decided by the expatriate on an individual basis depending on the time available. The company tries to provide the family with group lessons in order to facilitate establishment of a network with other people in the same situation. If the family members are at the same level, it is preferred that they study together. A cost limit of SEK 15,000 is set for the language training of each family member. For the expatriate, on the other hand, the extensiveness of language training is decided based on performance and language adaptability, rather cost limits since it is in the interest of the company that the expatriate gains as much language skills as possible. However, if the expatriate is not making progress or is not interested in applying newly acquired language skills on the job, it is not worth the cost of having them taking expensive language lessons.

Support for the family include company-initiated communication during the expatriate assignment, assistance with practical issues such as insurances and health care, pre-visits either organized by the company or relocation consultants adapted to the needs of the expatriate family. The expatriate families are also informed that they can contact the company if need for additional support arises, and meetings are held with the trailing spouse to discuss the period abroad prior to expatriation. The company also has apartments available in the home country that can be used if the expatriate families must be immediately withdrawn, and has no home to return to. If the expatriate family for some reason does not function in the host country, the company sees no point in trying to convince the expatriate to stay on the assignment since he or she will probably perform at a lower level. However, it is very rare
that expatriates have to be withdrawn since the assignments are rather short. All families are offered a thorough health examination both before expatriation and upon repatriation. Other type of support include help with practical issues such as applying for visas, getting registered in the host country, getting gas and telephone lines functioning, et cetera. The company also tries to provide contact with an expatriate family already in, or repatriated from, the host country from which the newly expatriated family can receive advices regarding what to bring and what to expect from the host country and the assignment. It is further seen as an advantage if the families are identical in age and number of children. Host-country orientation is provided in the form of written material purchased from consultants, containing information regarding country history, economical condition, taxation issues, cost-of-living and price index, et cetera. Electrolux has also hired a consultancy firm to assist the company in evaluating expatriate family experiences upon arrival in the host country, and to provide additional services needed by the expatriate family. Finally, the company tries to meet with repatriated families to evaluate the support provided and difficulties encountered in order to improve support for future expatriate families.

5.1.3 Repatriation Planning

Repatriation is seen as especially difficult since organizational restructuring has led to that many expatriates cannot be repatriated into their original home organizations. These expatriates are offered a two years extension of the expatriate assignment. Thereafter, they have to choose between an ordinary employment in the host country or to find another job in the home country. For those expatriates who are intended to be repatriated into the home organization, the respondent state it important to discuss the repatriation prior to sending the expatriate, and to keep continuous communication regarding repatriation issues during the assignment. Much of this responsibility is laid upon the Talent Management department, which is accountable for taking the broader perspective of employee career development, as well as evaluating newly acquired skills to find a suitable job upon return. The company is further holding discussions whether or not to standardize pre-visits to the home organization before repatriation. Today, pre-visits are sometimes offered, but not in every case. Formal annual appraisal talks are held and reported to business unit HR in order to match newly acquired skills of expatriates with available job positions in the home organization.

However, the respondent emphasizes that the entire responsibility of career communication should not be placed upon the organization. The individual also has to take initiative and search the Intranet for suitable and available positions back home. Further, the company has a checklist to follow when providing organizational orientation upon repatriation. However, due to advanced communication technology, expatriates are generally as aware of organizational changes as other employees in the home organization. More problematic are changes in the home country and low interest of friends and relatives to listen to the experiences gained abroad.

5.1.4 The Electrolux Group in Comparison

The respondent state Electrolux to be rather good at expatriate management considering the low number of expatriates. The respondent state retaining of repatriated individuals to be one of the most challenging issues facing expatriate management due to lack of suitable jobs in the home organization and too high expectations of the expatriates. This could be improved through better planning and more honest appraisal talks including both performance on the
job and future career options. The process of finding a suitable job for the repatriate should begin at least a year in advance of repatriation. Further improvements could be made by being more clear about salary policies, and by improving planning and evaluation. These are also areas in which development is heavily emphasized. The objective for the near future is to improve the repatriation planning in order to further reduce to loss of repatriated personnel and improve the organizational utilization of their newly acquired skills and knowledge. However, the respondent state Electrolux to be generally satisfied with the overall expatriate management package.

5.2 Case Two: Scania

The core of Scania’s operations is the development, production, and marketing of trucks for heavy transport work (Scania, 2002). In this business area, Scania is the number four in the world, and number three in Europe. Scania is today also the fourth largest manufacturer of buses and coaches for more than 30 passengers in the world. The company has since it was founded in 1891 delivered over one million trucks and buses. Further, Scania has an Industrial & Marine Engine business area that is a specialized operation in which Scania supply engines in customized versions for applications such as boats, electrical generators, earth-moving machines, and harvesters. The operations of Scania are based on a worldwide network with operations in over 100 countries. In the year 2001, Scania had over 28,000 employees, and a total turnover of just above SEK 53 billions. Scania’s headquarters are located in Södertälje just outside Stockholm, Sweden.

The respondents were the Manager of International Assignments with six years of experience within the area, and an Area Manager with two years of experience and responsible for, for instance, Brazil and Mexico. Within the International Assignments department, there are three area managers, and one administrator. Each area manager is responsible for a number of countries, handling issues such as policies, approach, conditions, taxes, insurances, and pension. The administrator is responsible for issues including the actual move, the family situation, and living situation. The countries are divided among the area managers, not according to part of the world, but mixed so that each area manager has responsibility for countries in various parts of the world. In that way, each area manager has knowledge about different parts of the world, and can more easily fill in for one of the other area managers if needed. Further, countries in the same part of the world often face similar conditions. Therefore, by having more than one area manager responsible for countries in the same part of the world makes cooperation more easy and necessary. These persons are therefore well acquainted with the work of each other.

Scania usually has approximately 150 expatriates on assignments longer than one year. However, there has been a temporary downturn the last six months reducing the current number of expatriates to 135. Expatriates are sent to approximately 50 countries, with the emphasis in Brazil, Latin America, where the largest subsidiary is located. Eastern and Central Europe are growing as expatriate destinations, while Western Europe has been a strong expatriate market for a long time. Scania view themselves as one of the best companies in Sweden regarding repatriation, even though much improvement could still be made within this area.
Due to economic conditions, international assignments are for the moment rather short-term. Many contracts signed nowadays are for one year, though these are often prolonged. However, this is expected to change as soon as the world economy improves. Most of the expatriates are men between 30 and 50 years old. Since Scania operates within a male dominated industry, very few expatriates are women. Many expatriates take on several assignments during their career. The usual time abroad is three years, with possibilities of extension. However, Scania does not want the expatriates to be abroad more than five years at a time in the same country. Most of the expatriates are sent abroad to fill managerial positions such as country manager, financial manager, or service manager. Further, specialists are sent to educate foreign personnel.

Originally, Scania sent Swedish personnel abroad to become missionaries of the Scania concept and culture, to teach host nationals how to work with their products. These missionaries was withdrawn into the home organization after a period of about three to five years to be fed with new information before being sent on another international assignment. Today, Scania has more of a exchange perspective in which expatriates are sent out from, and in to, different parts of the world to generate an extensive global knowledge. Therefore, Scania also has a lot of inpatriates in Sweden. However, in order to reap the benefits of such global experiences, Scania must become much better of taking advantage of the knowledge of repatriated individuals. Furthermore, since Scania has become a multinational company, they have to view expatriate management differently. An expatriate does not have to come back immediately after an assignment since the company is not centralized to head-office to the same extent as before. Therefore, a so-called third country national (TCN) can be floating around for quite some time before returning and yet keep in touch with the global network. In such cases, the pressure on the home organization is even bigger when it is time for repatriation. Regarding the future, the respondents foresee a decrease in ordinary expatriations outweighed by local employees and traveling expatriates. The respondents further predict more emphasis to be placed on the trailing spouses.

Since Scania has expatriates in many countries but only a few expatriates in every country, it is difficult for the company to adopt a standardized approach. Very few expatriates have to be withdrawn in advance, although it has occurred. However, Scania is aware of that some families are not satisfied with their situation abroad, which could have implications on the job performed by the expatriate. By having rigorous preparation of expatriate and their trailing families, Scania believe such risks to be minimized. The respondents believe Scania to be one of the MNCs with the lowest repatriate turnover, even though some repatriates leave the company following repatriation. Even though repatriate turnover is rather insignificant in relation to the total number of repatriates, the respondents still believe it to be a problem facing the organization.

The International Assignments department is responsible for all expatriates, regardless of country of origin and destination. International Assignments is not involved in the recruitment phase in Scania’s expatriate process, visualized in figure 5.1 on the following page, even though this would be preferred by the respondents in order to incorporate their competences for a more long-term view of expatriate career development and their knowledge of different countries. Even though not standardized, International Assignments is sometimes contacted to assist the recruiters with information regarding country of destination for the assignment. International Assignments is usually involved after the recruitment phase. The last couple of years, Scania has been improving the expatriate process, and the International Assignments
department in particular has been striving to become involved as early as possible in the expatriation process, preferably as soon as a need for expatriation arises. Quite a progress has been made, and today, the International Assignments department has much more influence in the expatriation process than it used to have a couple of years ago. Thanks to this, the expatriations are much better prepared nowadays, and the company now has greater control over issues such as taxation in host countries.

![Figure 5.1: Scania’s Expatriation Process](Source: adapted from Scania corporate document)

### 5.2.1 Career Development

Scania mainly employs two types of expatriate assignments, specialists and managers. A specialist is sent out, for example if Scania receives a large order of trucks, and the buyer wants a competent specialist to come along with the purchase in order to educate the local technicians and mechanics how to serve the trucks bought back. In those cases, no career planning is incorporated in the expatriate assignment. The specialist is merely sent to teach HCNs how to serve the trucks, and is thereafter brought back home. The other type is to send out managers to lead the organizations. Scania also has a program called “Personal Enhancement Program” PEP. The company sends out “hot potentials” on PEP, people that are up and coming, as a step in their career development. This opportunity is often offered during the recruitment process, in order to develop the future career of high potential employees. However, the problem facing Scania is how to repatriate these individuals into the home organization after a completed assignment in order to best take advantage of the skills and experiences of the hot potentials and keep them within the organization. The responsibility of taking a broader career development perspective lies upon the expatriate recruiters, although the respondents do not believe that such a perspective is fully functioning presently. The respondents believe both the organization and the expatriates to be clear about the underlying reason for, and responsibility during, the expatriate assignment. However, even though career implications are discussed with the expatriates prior to acceptance and departure, it is found difficult to hold back expatriates’ expectations regarding career implications of an international assignment.

International experience is a clear and stated advantage, although not a prerequisite, in order to climb high in the organization since 95 per cent of all sales are made internationally. No written policy exists that one should have been working abroad in order to reach the higher regions of Scania’s organization, but many of them have international experience. Regarding today’s top management at Scania, about nine out of ten top managers has for some time during their career been working abroad.
The actual monitoring of the competence and performance of the expatriates during their assignments is mainly handled by the recruiting officers since they also are responsible for finding a suitable position upon return. The monitoring of competence development and performance on the expatriate assignment is of great importance since the expatriate develops significantly during the assignment, and it would be very difficult to find a suitable position to match the new skills and experience of the repatriated individual without such monitoring. Databases are used in order to keep track of every individual regarding acquired competences and the seniority level they have reached. When a need to fill a position in another country arises, it is therefore easier to find the right person to fill it. However, filling a position abroad is not always the easiest of tasks since a chain reaction may occur. If, for instance, a managerial position needs to be filled in Brazil, and there is no suitable local employee with the competence needed available, an expatriate has to be used. Then the position of the individual to be expatriated must be filled, and the same problem arises again. This chain can become rather long before a position can be filled by local competence. Therefore, there is a high pressure on the recruitment department in order to keep these processes fluent, especially if there are several such situations occurring worldwide at the same time. The Recruitment department must therefore have total control over issues such as contract lengths and competence development in order to be able to have any planning whatsoever. In such cases where there is a long chain effect, decisions must be made quickly and there might not be time enough to prepare the expatriate nor the family before departure. However, such cases are rather rare.

Expatriates operating in a subsidiary usually reports to a senior staff member on site, and the country managers usually report to corporate management located in Sweden. Therefore, when Swedes are sent as country managers, there is a natural contact between the expatriate and the home organization. Representation office expatriates have their supervisors and department in the home organization handling all their administrative issues, and hence, have an automatic communication with the home organization. However, the nature of the communication is in both cases first and foremost business related rather than career related.

Scania is far from satisfied about their situation today, and believe that they can do a lot more in order to enhance their possibilities to take advantage of the investment of sending a person abroad in terms of employing the newly acquired competences of the expatriates. Often the expatriates do not feel that they are given sufficient attention upon return, considering the new skills and knowledge they have gained abroad.

### 5.2.2 Expatriate Support

Normally the expatriates are guaranteed a net income where the company pays tax and social security contributions on behalf of the employee. In countries that do not have a strong currency, the expatriates are offered a split salary in which one part is paid in the home country currency, and the rest in the local currency. Scania is considering to develop a new salary policy based on what salary the person would be upholding in their home country for the job to be performed abroad, which is important in order to uphold a link to the home country during the international assignment. The rest of the salary is determined by cost of living, any eventual hardship, plus a 10 to 15 per cent expatriate premium. If the expatriate is transferred from a high-cost country to a low-cost country, it is possible that the salary will be lowered. However, if the expatriate is well informed about the system, this should not create any major problems. Even if the expatriate receives less net income, the actual purchase
power might even be higher. By employing such a system, the continuous link to the home country salary could help reduce the shock of having all expatriates benefits withdrawn upon return to the home country, and thus facilitate repatriation.

If an expatriate has decided to stay in the country of assignment, there is a gradual downsizing of the expatriate benefits to ease the shock of different benefit levels. This is usually executed in a three year plan starting with cutting, for instance, the housing coverage the first year, the cost of living together with other added benefits the second year, and finally setting the salary at a local level the third year.

During the expatriate preparation phase, the expatriates are taken through a number of steps, including an obligatory health examination of the whole family, briefing about security issues in the host country, obligatory language training taking place as soon as possible, work and residence permit handled by International Assignments, accommodation is usually handled through local HR organization, and, if such an organization does not exist – through a relocation consultancy firm, taxes and social securities are handled by both home and host country consultants in order to inform the expatriate about declaration issues in both the home and host country. Often, the expatriate receives professional declaration assistance in the host country. Scania also has an in-house insurance expert assisting expatriates. Swedish expatriate families are also sent to a two-day cross-cultural training, provided by a consultancy firm.

Expatriates that are sent out should be able to sell trucks from day one, instead of running around taking care of the practical issues that needs to be handled when moving abroad. Such issues are therefore taken care of by International Assignments in order to be more cost effective. These issues can involve housing, taxation, schooling, insurances, declaration, etcetera. International Assignments regards itself as a service center, which should provide as much service as necessary in order to facilitate for the expatriate so that he or she could do the job without interference.

Scania provides the expatriate families with free housing in the host country. By doing this, the expatriates have the possibility of keeping the house or apartment in the home country while overseas. However, Scania does not care what the expatriate does with his or her home, and neither takes any responsibility for the house or apartment in the home country. The housing in the host-country is “safety classified”, which implies that the expatriate family must live in an area perceived by Scania to be secure. Expatriates have a subsidized car, and one annual home trip for the whole family. Some countries are hardship-classified, and expatriates living in those countries are offered a recreational allowance in order to leave the country for vacation once a year. Expatriate families in hardship countries can also be offered membership in a one or more clubs, for instance golf clubs, swimming clubs, etcetera. Spouses on assignments longer than two years are offered a spouse pension including a health insurance. However, this funding does not cover the entire amount the spouse would have received by working in the home country. Schooling for expatriate children is taken care of, and paid for, by the company. Either, children are set in international schools in the host country, or in a boarding school in the home country. In cases where the children are set in boarding schools in the home country, the family are usually given more traveling opportunities in order for the family to get together more than once a year. However, this is usually settled on a case-for-case basis. Scania does not have any possibilities to offer the trailing spouse an employment within the host country organization since two employments for every needed expatriation would be too costly.
The company covers the moving expenses within certain limits. If, for example, the expatriate family is moving to Brazil, they cannot bring their whole home with them since the humidity will damage the goods during the actual shipping. However, if the family is moving to a country in Europe, it is possible for the family to bring their whole home. Scania covers all costs of moving to and from the host country, as well as storage costs if the expatriate family has decided to sell their house or apartment in the home country and cannot bring all their belongings. The company covers for the storage costs up to six months after return to the home country so that the newly repatriated family has a chance to find a new home.

Scania encourage their expatriates to keep in touch with the home organization, and to visit the company during their annual home visits to prevent the “out-of-sight, out-of-mind” syndrome. Some also have a “home-week” in which the expatriate spends one week, without the family, in the home organization. This is mainly for business and operations purposes, but also offers an opportunity for the expatriates to keep in touch with people in the home organization. However, it is a challenge to get the expatriates to understand the importance of nurturing the network in the home organization since they are often occupied thinking of other issues.

Scania does not employ any type of formal mentoring program at present. It is much the responsibility of the individual expatriate to build a network in the home organization in order to facilitate repatriation and relocation upon return. Discussions regarding a formal mentoring program are at the moment being held at Scania. However, they have not yet reached a fully satisfying solution. If the individual perceive that he or she has not had the necessary contact during their assignment, there is a great risk that they will be dissatisfied upon return and, therefore, leave the company. Scania views such turnover as failures since the company wishes to take advantage of all the new skills and knowledge the expatriates bring home, and acknowledges that the current repatriation process could be improved.

The cross-cultural training provided prior to departure is not complemented with organized post-arrival cross-cultural training. However, Scania has begun experimenting with post-arrival cross-cultural training for inpatriates coming to Sweden. So far, two separate families have received such training. Language training is offered to the whole family throughout the assignment, without cost limits. Scania does not specify the level of skills to be acquired, but all expatriates are required to make a serious attempt in learning the language. Expatriate children are not necessarily provided with training in the host country language, depending on the type of education they are attending, English might be better suited. However, if preferred, training in both the host country language and English can be provided.

The well being of the trailing family is seen as a crucial success factor. If the family is not happy with their situation, the expatriate will not perform well on the job, and therefore may have to be withdrawn from the international assignment. In such cases, the company is faced with an interrupted recruitment process that has cost the company a lot of money and resources. The company therefore holds meetings with the expatriate family prior to signing the contract to make sure that the decision is an informed one on the behalf of the family. The company also arranges a pre-visit to the host country ranging from two to seven days. Before the actual departure, the family is provided with a checklist of what to think of and what to do before leaving. During the actual assignment, most of the contact with the expatriate family is handled by the local HR department. Support during the actual assignment handled by International Assignments includes salary negotiations and ad hoc support.
However, Scania has very little contact with the family during the actual period abroad, unless problem arises and the family needs help with some specific issues. Nevertheless, Scania encourages the trailing spouses to contact the home country organization if a need or problem arises, and also inform them of other networks available in the area of assignment. One such network is SWEA International (Swedish Women’s Educational Association International), which organizes different activities for Swedish women living abroad. Scania also has a worldwide Intranet connection available for most companies abroad to keep updated about the organization. The International Assignments department is also developing their own website on which expatriates and their families can search for information and useful tips. A network for spouses is also planned to be available on the website.

When problems arise, Scania tries to get a clear understanding of the problem and thereafter provide the support necessary. Scania also have an emergency call center that expatriate families can call if an emergency, such as an accident, a robbery, or psychological difficulties should occur. At the call center, doctors, insurance people, and therapists are available. In those cases where the emergency call center realizes that the expatriate assignment does not function for one or several reasons, Scania can decide to terminate the assignment and bring the family back home. However, the company seldom gets to know that the family might be in trouble since expatriates are hesitating to jeopardize a lifetime opportunity by informing the company that things are not running smoothly. Scania tries to be open-minded, but if the family does not function, it would be too costly to keep them abroad and a termination of the assignment is in such cases preferable.

5.2.3 Repatriation Planning

The issue of repatriation is often, although only to a certain degree, brought up before leaving. Individuals on their way out on the greatest experience of their life usually do not listen too carefully to information about the repatriation period since it often lies three years ahead in time. The most emphasis is put on making clear for the individual the importance of taking own initiative in contacting the home organization prior to repatriation since a successful repatriation is, according to the respondents, as much in the expatriate’s own interest as in the company’s.

Repatriation procedures are preferably initiated six to twelve months prior to repatriation. If it is done any later, there is a risk that the repatriation planning has little effect. Meetings are held every month between International Assignments and Recruitment, the latter who are also responsible for repatriation, in which upcoming repatriations are discussed. Six months before repatriation, the expatriate families are sent a repatriation package consisting of a book dealing with repatriation issues, a checklist, and some information regarding what to think of. International Assignments also communicates frequently with the expatriate family prior to the actual repatriation to solve the practical issues of moving the family back home. At the same time, the recruiters start searching for suitable positions for the expatriate in the home organization upon return. The expatriates are also generally more receptive of repatriation information twelve to six months prior to return, since they are often starting to realize that the international assignment is about to end.

Once repatriated, the expatriate families meet with the area managers to exchange information regarding the expatriate assignment and the host country. A welcome home day is also arranged twice a year with a therapist available. Some departments within Scania also arrange
some activities during the annual home visits including visiting the home country organization. During those visits it is important that the expatriates visit as much people as possible within the organization since this could facilitate repatriation and the finding of a suitable position upon return.

It is often hard to convince a person to come back and work at a lower position at a third of the money after having spent several years abroad in a high position with high salary. This could be of double nature since the pre-departure family income usually is based on a double income, both the husband’s and the wife’s. During the assignment the expatriate has one salary that is enough to support the family. When they return to their home country, the spouse has been standing outside the job market for several years and it might be hard finding a job at all. Taking this into consideration, plus the fact that the salary of the repatriated individual is significantly lower than before, it is really tough for the repatriate to adapt to these new conditions. During such cases the individual either leaves for another international assignment right away or he or she could even leave the company to try to find a better position at another company. However, if the communication has worked efficiently during the assignment the employee knows that this will happen and might be more patient and therefore wait for the right position to come up. According to statistics, the repatriated individual usually receives a better position, than he or she had before leaving, about one year after repatriation.

One of the toughest challenges lies in toning down the expectations that repatriates will immediately receive a dream job when returning home from an expatriate assignment. In order to solve this problem, Scania is working on improving the repatriation phase by using external consultants and try to figure out what can be done in order to improve repatriation. Scania consider themselves to be quite far ahead in repatriation issues compared to other Swedish MNCs, even though Scania does not believe that they do enough for their repatriates. What needs to be improved, according to the respondents, is the communication with the expatriate during the assignment in order to keep the organization up-to-date with the progress and development of the expatriate. The respondents also emphasize the importance of communicating to the expatriate the difficulties of monitoring competence development and match with the organizational needs to provide the expatriate with a suitable job position immediately upon return. What the company can do is to compensate the repatriates retroactively by providing them with a better position as soon as a suitable job opening occurs. Also, included in the pre-departure cross-cultural training is some information of the difficulties of repatriation in order to better prepare the expatriate and keeping the expectations at a reasonable level.

Scania also want to implement a model developed by a London-based consultancy firm in which the consultant focuses the most on the actual work the expatriate performs instead of focusing on cultural adaptation or family issues as most other consultants do. In this model, the consultant sits down individually with the person to be repatriated some time in advance of the actual repatriation and briefs the individual about issues such as current home country situations and potential need for changes in the expatriate’s CV. They also discuss practical issues such as suitable behavior upon return, the probable lack of interest in hearing about the international assignment the friends and family will show, and the importance for the repatriate to make oneself and the newly acquired skills visible to management in the home organization. The consultancy firm also stresses line managers with questions about how they are planning to take advantage of the new skills and knowledge the repatriate actually has
required. This program also places more emphasis on the individual repatriates, and stresses the importance for them to employ the tools made available by the consultants to actively enhance their careers. This is something that the International Assignments department would like to teach the whole Scania organization in order to better take care of the investment that they have done in sending an expatriate. A program like this would undoubtedly facilitate repatriation, and make it more efficient.

If a person has been abroad for a longer period of time, repatriation is much the same thing as expatriation. A lot of things have probably changed in the home country making the repatriate unfamiliar with the home country upon return. For instance, an expatriate coming home to Sweden today would probably not know where to buy stamps since most of the post-offices have closed. This might appear to be a minimal problem, but when facing several such day-to-day problems, the repatriation adjustment may be very difficult. Further, friends and coworkers might have moved or, similar to the repatriate, gone through personality changes. The repatriate must also learn about all the new TV programs people in the home country are talking about. According to the respondents, at least 80 per cent of the total emphasis of an expatriate assignment is put on preparation and about 20 per cent on repatriation. If not totally the opposite, more than half of the emphasis should be placed on the repatriation phase. When leaving for expatriation, the individual is usually very excited and creative, and also receives a warm welcoming and support in the host country. However, when returning home the expatriated individual is usually expected to continue as before the assignment, and everyone expects him or her to be Swedes immediately upon return. Furthermore, while on the assignment, the expatriate has the International Assignments department serving as an extra personnel department specialized in providing expatriate support. Once repatriated, the individual is no longer the responsibility of International Assignments, and is left only with the ordinary personnel department. This department does not always have a thorough understanding of the difficulties of repatriation adjustment, and is often busy with ordinary day-to-day necessities. Therefore, the individual no longer has the dedicated source of support he or she had during the international assignment to turn to when needed.

5.2.4 Scania in Comparison

The respondents claim Scania’s expatriate program to be about 40 per cent more expensive per expatriate than their closest competitors, which possibly makes them one of the best Swedish MNCs regarding expatriate management. Since each unit sold provides revenues of about SEK 1,5 million, top management is easily convinced not to cut costs in order to facilitate as much as possible the performance of the expatriates. Scania is rather well aware of other Swedish MNCs’ expatriate management practices, since it is part of the UPC⁴ cooperation of the largest MNCs in Sweden, in which managers handling international assignments or personnel working abroad meet every six months to discuss and exchange ideas about expatriate management. This cooperation was initiated during the 70s, and the member MNCs have to a great extent been the same since the start-up. In order for a MNC to be included, it must have a large population of expatriates spread among many countries, and the manager must have knowledge and experience to contribute to the group. Issues such as how to deal with the economical conditions in Argentina, future trends, whether or not Swedish MNCs should strive for university courses in international assignments, and if the MNCs have resources available to provide the expertise necessary for such courses, are

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⁴ UPC is the abbreviation of UtlandsPersonalChefer – managers handling personnel working abroad.
discussed in the cooperation. They are also discussing whether or not to institute a pay-roll program for all expatriates within these MNCs and hire the same consultancy firms for all these MNCs in order to reduce costs. They also foresee a development of the cooperation among the Swedish MNCs towards a cooperation in which the MNCs try to help each other by providing job opportunities abroad for the trailing spouses of expatriates in other MNCs in the network. In order for such a development to be fully possible, more MNCs are likely to be included in the cooperation, which today consists of Swedish MNCs such as the Electrolux Group, Ericsson, the Volvo Group, AstraZeneca, and the SKF Group. Scania already has an informal agreement with AstraZeneca, with R&D headquarters located close to those of Scania, that they shall try to help each other out, if not with a job opportunity for a spouse of the other company’s expatriate, so at least with leave of absence for the trailing spouse during the assignment. In order to fully reap the benefits of such cooperation, the respondents believe that it will have to expand both throughout Europe and globally.

5.3 Case Three: The Volvo Group

Volvo is one of the world’s largest producers of trucks, buses and construction equipment, holding a leading position in the business areas of marine and industrial power systems and aircraft engine components (Volvo, 2002). Since 1999, the Volvo Group focuses exclusively on transport equipment for commercial use. Founded in 1927, Volvo today has almost 72,000 employees, production in 25 countries, and operations in more than 185 countries. The Volvo Group headquarters are located in Gothenburg, Sweden. The Volvo Group’s total sales amounted to SEK 181 billion in 2001. Trucks is by far the largest business area with 67 per cent of total net sales during the first nine months of 2002.

The Volvo Group currently has 530 expatriates employed in approximately 55 countries spread among all parts of the world. Of these expatriates, approximately 100 are employed by Renault Trucks, and about 15 by Mack Trucks. The most common expatriate host country is the United States in which about 100 expatriates are on assignment. However, China and France are expanding as host countries. The typical expatriate is a married man in his 40s with two children. Of all 530 expatriates, only five or six are women. Expatriates are often one of two types: the professionals sent out to teach local organizations their expertise before being repatriated into the home organization; or individuals pursuing an international career. The latter are useful for the organization since they have often been abroad on different international assignments for 10 to 15 years, and can take on a new international assignment on short notice. The Volvo Group has five types of expatriate categories defined: short-term expatriates, with assignments up to six months; expatriates; commuters, traveling back and forth; local placements, hired according to local conditions; and international assignees, expatriates without time limited assignments. The international assignees are offered the same conditions in terms of compensation and support, with the difference that they are not offered an employment guarantee within the home organization upon return since they are not expected to return to any home organization. The expatriate assignments have an initial contract length of two years, but are often prolonged with an additional period of time. The average expatriate assignment has a duration of three to four years.

The respondent at Volvo began working with international personnel issues at Volvo in 1977 when Volvo started sending expatriates to Belgium. When Volvo started its factory in Brazil in the late 70s, 30 to 40 expatriates needed to be sent. The department dealing with expatriate
management grew until it was divided between the different business areas in the mid 80s. The respondent was the manager of the department of Volvo Trucks for 12 years. Two years ago, Volvo Trucks bought Renault Trucks and Mack Trucks and decided to develop an expatriate policy in the Volvo Group, in which also Volvo Buses, Volvo Construction Equipment, Volvo Penta, Volvo Aero, and Volvo Financial Services are included. The respondent moved on from a managerial position to a developmental position for this integration project, in which he has now worked two years. The former department of the respondent is now called Volvo International Assignment Management, VIAM\(^5\), in which HR Partner that handles day-to-day functions and support, and Center of Expertise that handles policy and strategy issues, are parts. The respondents work in the Center of Expertise together with two more persons.

The new policy has been employed for about one year and includes issues ranging from financial compensation to support practices. The current policy is a mix of the former policies of the Swedish Volvo Trucks, the French Renault Trucks, and the American Mack Trucks. VIAM has employees working at several locations outside headquarters: three persons are located in Lyon, one in Brazil, three in the United States, and one in Brussels. This group holds telephone conferences together with the Center of Expertise in headquarters every second week, and meet in person once a year. In the near future, the Volvo Group will continue to work on the policy develop together with Renault Trucks and Mack Trucks and better establish it throughout the organization. Since this policy is rather new, the Volvo Group has expatriates sent out before the new policy was adopted, and thus has expatriates contracted according to both the new and old policies. Focus must therefore be placed on establishing the new policies as the old policies gradually disappear. The Volvo Group is also working on developing a return-on-investment model in order for the organization to be able to see the actual costs and organizational benefits of sending expatriates, and the possible organizational benefits of selecting a specific individual for an expatriate assignment.

\section*{5.3.1 Career Development}

About 80 per cent of all expatriations are employed for business need purposes. The remaining 20 per cent are either a top managerial layer sent around to different managerial positions around the world, or young potentials sent abroad for career development purposes. The reason for the expatriate assignment is most often very clear to both the MNC and the expatriate.

The recruitment of expatriates is often handled by the line organization and is most often govern by the organization’s competence and business needs. Usually, expatriates are not assigned if a HCN capable of doing the job is available. However, due to the incorporation of Renault Trucks and Mack Trucks into the Volvo Group, the organization strives for a more international mix among the personnel. Often, the line organization selects a candidate before VIAM is involved. VIAM does not see a need to be involved in the actual expatriate recruitment process. The recruitment should be the responsibility of local HR departments with knowledge of the specific business area and needs. However, VIAM is involved in educating the local HR departments in essential issues distinguishing expatriate recruitment from ordinary personnel recruiting. For instance, the family and health situation must be more

\(^5\) Volvo International Assignment Management will from now on be referred to as VIAM.
thoroughly examined, and more than one candidate should be looked upon in case the first hand choice should not be interested or suited for international assignments.

Line managers usually establish a rough career development plan with their employees individually that is followed up by appraisal talks. Therefore, it is much the responsibility of the individual employees and their line managers to identify the needs and benefits of an expatriate assignment in the individuals’ overall career plan. Hence, line managers and individual employees usually discuss career implications of an expatriate assignment prior to acceptance.

International assignments and experiences are valued in the Volvo Group organization. The former CEO even stated an international assignment to be a necessity in order to reach the higher levels of the organization. The current CEO also shares this view of international experience, and has stated that in order to be a global enterprise, one must also be able to act global. The vast majority of the higher-level managers have been on at least one international assignment.

5.3.2 Expatriate Support

The Volvo Group has shifted from host country salaries to a salary based on the current home country salary, using a balance sheet model, roughly depicted in figure 5.2 below. This model has created some frustration among the personnel since employees from different countries may vary widely in the salary they receive for doing the same job, depending on the salaries in their home countries. Further, expatriates with one or more earlier assignments within the organization may find that they will receive less compensation and benefits when being compensated according to the new model.

![Figure 5.2: The Volvo Group Salary Model](source: recreated from respondent’s sketch)
The non-spendable and tax shares of the salary are not altered. However, the spendable part is adjusted using an average spendable level from the four most important Volvo Group countries (Sweden, Belgium, France, and the United States), and thereafter making adjustments according to position level and family size. Further, adjustments to the spendable part of the salary, both reductions and additions, are made in accordance to cost-of-living indexes for the host countries, provided by a consultancy firm. All expatriates also receive a mobility premium of 10 to 15 per cent of the net spendable part. Expatriates assigned to a host country in the same continent receive 10 per cent, while expatriates assigned to a host country in another continent receive 15 per cent. The location allowance is what used to be called hardship allowance within the organization, and is offered to expatriates in some countries, depending on an index provided by the same consultancy firm that provides the cost-of-living index. The organization pays the tax, and the expatriates receive the rest in net income.

For the international assignees, the salary is not based on any home country salary since these individual have often been abroad for so long that no home country can be said to exist. Even though an international assignee has a membership in a certain country, he or she may have worked most of their career in other countries. Therefore, the salary offered to an international assignee is solely based on the average spendable level of the four most important Volvo Group countries, and adjusted according to family size and position level. Mobility and location allowances similar to those of the expatriates’ are also offered.

The Volvo Group also provides the expatriates and international assignees with free housing, except for running costs such as gas, water, and telephone. However, it will be discussed during the next VIAM meeting in January whether or not the running costs should also be paid for by the organization since they vary widely between countries, and are in some countries difficult to separate from the general housing costs. The organization also pays for the actual move to and from the host country, and offers a settling in allowance that the expatriate can use for house product purchases. However, vital house equipment such as refrigerators and stoves are already paid for by the organization. The organization has become more restrictive regarding recreation and club allowances, and now only provides such allowances if it is deemed necessary due to a tough environment. Expatriates and international assignees are either provided with a company car, or with a car allowance. The company also provides with expatriate children’s school and education, and pays for annual home visits for expatriate families and provide pension allowance. Further, the Volvo Group also provides with a spouse pension fund in which the company annually deposits SEK 30,000. This capital is intended as pension savings, however, if the employee leaves the company, the capital is at the disposal of the spouse.

Prior to departure, the expatriate family receives a lot of information from the company. They are also sent to seminars organized by a consultancy firm, in which they are informed about their own culture, culture shocks, how to handle culture shocks, et cetera. By having received such information, expatriate families are considered better prepared to deal with the new environment. Further, all potential expatriates are sent to a rigorous health examination at an international health center. This center also has qualified personnel available that the expatriate can call if a health problem occurs while on the assignment. Most support activities organized by the home organization during the actual expatriate assignment are of administrative nature and include, for instance, assistance with home country pension and insurances issues. All cross-cultural training organized by the parent organization takes place before the departure. However, some local organizations offer on-site cross-cultural training
on their own initiative. The organization also offers language training for the expatriate and the trailing spouse, and if necessary to the children as well. The organization pays for up to 200 hours of language training per person, which could be held both prior to departure and in the host country. The home country language training is held in groups of expatriate families. However, in the host country the language training is often held privately since there often are no more newly arrived expatriate families with the same level of language skills.

The main communication between the home organization and the expatriate deals with administrative issues such as pension, insurances, health care, etc. The expatriates also have the possibility to contact the home organization if a need or problem arises. However, the Volvo Group also has a formal mentoring program to handle frequent communication between the expatriate and the mentor and to facilitate repatriation. The mentor is selected by the expatriate and then approved by the company. A written contract specifying the contents of the mentoring relationship is also signed. The mentoring program is intended to create a natural contact with the home organization from which the expatriate can receive useful tips and news updates about the home organization. The mentor is usually a line manager or someone higher up in the organization than the expatriate. It is important that the mentor him- or herself receives information about what is going on in the organization, and has the influence necessary to be able to help the expatriate being repatriated to a suitable position in the organization. The Volvo Group also has an Intranet website under construction on which all necessary information from the organization will be available, as well as useful links to other organizations such as insurance companies, banks, etc. The Volvo Group also encourages the expatriates to communicate with their home organization on their own initiative. Expatriates are easily forgotten by their home organization while on their assignment, and it lies in the expatriates’ own interests to be kept in mind in order to facilitate relocation upon return.

The Volvo Group does not have scheduled activities with the expatriates during the annual home visits. However, expatriates are told to spend one or two days during their home leave to visit their home organization in order not to be forgotten. VIAM sometimes meets with expatriates on home visit as well, if wished for by the expatriate.

The respondent believes that the company in most cases is not made aware of problems facing the expatriate and the trailing family outside of work. Most often, the problems have become critical once the organization is informed. However, very few expatriates have been withdrawn due to such circumstances. The respondent states that in some cases, it would probably have been better to withdraw the expatriate than to keep him or her in the host country since the job performance of a troubled expatriate may be suffering. In those cases where the expatriate assignment is terminated in advance, it is most often due to family problems.

5.3.3 Repatriation Planning
Most repatriation-related communication with the expatriate during the actual assignment is handled by the mentor and the HR department to which the expatriate will repatriated. A formal responsibility of upholding the communication during the assignment is always included in the contract. Often, the responsibility is placed on a line department, which in turn has an employee responsible for personnel issues. Performance on the international assignment is rarely monitored for organizational purposes. The home organization manager
of the expatriate is often occupied with daily operations. The manager knows that an individual has been sent out that will sooner or later be repatriated into the organization again, but does not place much emphasis on this individual when actually abroad. The host organization manager, on the other hand, takes good care of the expatriates while in the host organization, but does not take responsibility of the expatriates’ situation before and after the assignment. The career development of expatriates is often forgotten during the assignment, and this is where the Volvo Group has to improve. Much more focus must be placed upon the broader picture, consisting of selection, planning, and monitoring, as well as the role of the international assignment in the overall career development of expatriated individuals. However, the respondent emphasizes that the main responsibility of career development lies upon the individual him- or herself.

Some of these HR departments would like VIAM to be involved in the repatriation as well, however, VIAM state this to be outside their area of expertise and responsibility. This may be difficult for the expatriates as well since VIAM has been so involved throughout the assignment, and suddenly the department is not involved at all. The parties involved in repatriation planning are mainly the local HR department, the line manager, the expatriate mentor, and the expatriate him- or herself. The respondent states the expatriate him- or herself to be the most important part in repatriation planning. The skills and experiences of some expatriates are highly demanded by their home organization. These expatriates are often hunted by the line managers and local HR department, and often receive several offers regarding different positions in their home organization. For these expatriates, finding a suitable position upon return is not that difficult. The problem arises when expatriates are not in high demand in their home organization. In these cases, more emphasis must be placed on finding a suitable position upon return.

Expatriates are not offered any pre-repatriation training or seminars. However, if they need to visit the home organization prior to repatriation to discuss their future jobs, this is paid for by the company. Once repatriated, the individuals are invited to a seminar in which they are briefed about the current company and country situation, and discussions are held about the personal situation facing repatriates.

The Volvo Group frequently surveys repatriated employees. What has been found to be most difficult for expatriates is the reentry into the home organization due to difficulties in finding a suitable job position that match both the skills and the expectations of the employee. The organization express to the expatriates prior to departure not to have too high expectations, and just because the expatriate go abroad on a two-year contract, he or she cannot expect to come back and be immediately promoted to higher positions. However, they are also informed that international assignments may be beneficial to career development if used right. The reentry into the home country is also found difficult. When going abroad, the expatriates are usually excited and full of expectations. However, when returning home the expatriates have a clear image of what to expect, but often find that the home country has changed, that they receive less financial compensation since expatriate compensation and benefits are withdrawn, and that people show very little interest in their experiences. Housing issues may also constitute a problem if the expatriate family does not have a home to return to, and children may find it stressful to have to attend a new school very different from what they are used to in the host country. The reversed culture shock is often worse than the culture shock experienced in the host country due to the more rigid expectations of what to encounter. The reentry process is what is most criticized by repatriates, and where the Volvo Group believes
to be able to improve significantly. However, the respondent does not believe that the organization can do much more than preparing the expatriate by informing about these problems, which probably will be experienced. Although it is a rather small proportion of the repatriates that are dissatisfied with the reentry process, it is usually their voices that are heard.

The Volvo Group offers all expatriates continued employment upon return, but does not specify the position the repatriate will occupy. This would be very difficult since the company cannot in advance anticipate the knowledge and experiences acquired by the expatriate, nor can guarantee that a position thought of as suitable even exists upon return. Often, the expatriates are repatriated into the same position they occupied before the international assignment. Many repatriated individuals change job position within one year after repatriation, which indicates that the first job positions offered to repatriates are often not the most suitable. As stated in the case introduction, this employment guarantee does not apply to international assignees as they are not expected to return to any home country.

Repatriate turnover, though, is surprisingly low. The respondent does not have any exact figures, but states that very few repatriates leave the organization upon repatriation. The respondent cannot with certainty explain the low repatriate turnover, considering the criticism regarding the reentry process, but states that the Volvo employee in general is very loyal to the company. Furthermore, since the Volvo Group consists of several business units, an employee does not have to turn to another organization to find a new job – employees can even change industry without leaving the organization.

5.3.4 The Volvo Group in Comparison

The respondent is well aware of the expatriate management practices of other Swedish MNCs since he represents the Volvo Group in the UPC cooperation among the largest Swedish MNCs presented in the previous case. The Volvo Group has been part of the UPC cooperation since its beginning in the mid 70s. Within this cooperation, issues regarding trends, problems, and procedures of expatriate management are openly discussed between the member MNCs. Generally, he believe Swedish MNCs to be quite similar to their approach but would place the Volvo Group in the upper region regarding quality of expatriate management. The respondent further believe Swedish companies to take more care of their expatriates than other European and North American companies, while the latter tend to provide more financial compensation. This could be explained by the nurturing values in Swedish culture, as opposed to the more materialistic values of other Western cultures.

5.4 Case Four: The SKF Group

SKF is the world leader in supplying products, solutions, and services in the rolling bearing and seals business. The competencies of the SKF Group include technical support, maintenance services, condition monitoring and training. Other products in the SKF Group is linear motion products, high precision bearings, spindles, and spindle services for the machine tool industry, as well as rolling bearing steel. SKF was founded in 1907, and has since then grown to about 150 companies with production in 24, and sales in 70, countries. The SKF Group, with headquarters in Gothenburg, Sweden, is organized in five divisions: Industrial, Automotive, Electrical, Service, and Aero and Steel, all serving a global market. The SKF
Group had in the year of 2001 a turnover of SEK 43 billion. The SKF Group employs about 40,000 employees.

One of the respondents works at SKF headquarters at Management Compensation & International Assignments, and is responsible for policies and contracts for all expatriates within the SKF Group, regardless of country of origin. She has 15 years of experience within this area. She has further six years of experience as a trailing spouse in Spain. The other respondent has been working as a Country Coordinator at HR Services in SKF Sweden for about one year, and is responsible for preparations and support for expatriates from Sweden as well as inpatriates working in Sweden. Usually, country coordinators are involved in contracts as well. However, in Sweden this is the responsibility of the SKF Group as headquarters are located in Sweden. Expatriations within the SKF Group have declined from 300 in the beginning of the 1990s, and currently the SKF Group has approximately 150 expatriates on international assignments. However, the trend is expected to turn up again in the near future. The proportion of Swedes among the expatriates has declined from 70 per cent to approximately 30 per cent in the recent decade. The decline of Swedish expatriates is explained by the fact that foreign subsidiaries have been in operations for a long time, and have therefore been able to develop competent personnel that are now both competent enough and willing to take on positions abroad. Of the approximately 150 expatriates from 31 different nationalities within the SKF Group, there are 43 different home organizations and 59 different host organizations in 31 different countries. The SKF Group differs from most other Swedish MNCs in that it has expatriates from so many different nationalities, which makes conditions, and especially pensions, very difficult to handle. Such a large number of countries makes it difficult for home organizations sending few expatriates to provide the best possible organized support for their expatriates, and also makes it difficult for headquarters to control and monitor the support conditions of all expatriates. Approximately 25 to 30 of the expatriates are constantly transferred between international assignments without repatriation to the home organization in between.

The typical expatriate within the SKF Group is a married man in his 40s with children. The expatriates that are constantly transferred between international assignments are generally older, with grown up children that have stayed behind somewhere. The average expatriate assignment lasts three and a half year. The initial contract length is two years, but is in most cases prolonged with one year. However, since about 20 per cent of the expatriates constitutes of the group that is constantly transferred between international assignments, the average time is increased. The SKF Group does not want the expatriates to be on expatriate contracts in the same country for more than five years.

Very few contracts are terminated in advance, which could be explained by the relatively short contract lengths. However, the respondents admit that the expatriates with their families may very well face problem when abroad, even if this is not reported to the company. Further, the respondents believe that Europeans generally have less problems with international transfers than North Americans.

5.4.1 Career Development
The SKF Group sends expatriates mainly due to business needs, although career development to a certain extent influences the decision. Career development purposes of sending expatriates were more common a decade ago when international assignments were part of the
trainee-program. This is not the current situation, although discussions are held about increasing the exchange of employees between SKF organizations around the world in order to increase their international competence. However, certain financial and control issues need to be solved before employing such an exchange. Such international transfers would not only be feasible to enhance both individual and organizational competence, but would also serve as a sales argument when recruiting new employees.

Presently, SKF usually sends out expatriates to teach local organizations necessary skills, or to managerial or controller positions. International experience is stated as very important for an individual wishing to reach higher positions in the SKF organization since the SKF Group has many international operations. It is always seen as an advantage, regardless of position, to have experiences of international assignments due to the international characteristics of SKF’s operations. The responsibility of career development through international assignments lies to a large extent upon the individual since the SKF Group announce available international positions that can applied for.

Although the expatriates are believed to have clear understandings of reasons for, and position to be filled, during the expatriate assignment, the respondents believe that the expatriates in many cases have too high expectations of their career advancement upon return. Even though the home organizations hold discussion with the expatriates prior to departure in order to keep the career expectations on a realistic level, they need to be more clear in their information to expatriates regarding the importance of international assignments for career development. Since it is very difficult for the home organization to monitor expatriates’ performance and development on the international assignments, no such specific expatriate monitoring is performed. This makes it difficult to provide them with a suitable job position upon return. Career related communication with the expatriate during the actual assignment is the formal responsibility of the home organization. Until recently, the communication responsibility has been laid upon Management Compensation & International Assignments. However, since the home organization is the one to provide with a job position upon return, the responsibility has been shifted to the home organization. Headquarters generally used to be much more involved in all expatriations, but nowadays SKF is of the opinion that as much as possible should be handled by the organization sending the expatriate.

5.4.2 Expatriate Support

The salary offered to the expatriates is, according to the respondents, built on the same principles as the model employed by the Volvo Group. Briefly described, the salary model is based on a classification of how much the specific position would be compensated in the home country. To that amount, a mobility premium is added, and cost-of-living and international living standard adjustments are made. Furthermore, expatriates going to hardship-classified countries receive an additional hardship premium. For instance, expatriates in China receive an additional premium of 25 per cent of the net compensation. The SKF Group further takes care of taxes and social costs. This compensation model is not as beneficial to some expatriates as the compensation system used before. For instance, a Swedish expatriate would according to the old system in most cases receive enough compensation to cover for the loss of the spouse’s income. Today, Swedish expatriates, and expatriates from countries similar to Sweden regarding income levels, will probably receive a compensation lower than the total family income in the home country.
The SKF Group pays for costs associated with moving to and from the host country, as well as providing with housing in the host country. The respondents state that, similar to the Volvo Group, the SKF Group does not cover running costs, such as gas, electricity, and heating, associated with housing. The SKF group further pays for insurances, spouse pension contributions, and provides with education for expatriate children, as well as necessary house equipment. In countries where deemed necessary, expatriate families are also offered membership in clubs and extra medical insurances.

The spouse pension contribution system is currently being questioned within the SKF organization. All spouses, regardless of earlier income or country of origin, receive the same annual amount. These contributions are often withdrawn from the pension fund by the spouse after the international assignment is completed. If these contributions are not used as pension, as intended, the respondents are of the opinion that these contributions could be provided for other purposes more useful for the spouse during the assignment. Further, since every spouse receives the same amount, regardless of country of origin, spouses from low-income level countries often receive more pension savings than the expatriate and employees in the host country organization. This creates a lot of dissatisfaction among employees in, and expatriates from, those countries. The pension issue in general, regarding how to best manage pension savings when expatriates are transferred between countries, will be one of the major challenges facing the SKF Group in the near future.

Prior to departure, expatriates meet with their country coordinator to discuss practical issues related to the assignment. A two-day cross-cultural training is also offered to expatriate families. Post-arrival cross-cultural training is generally not offered to expatriates and their families. Language training prior to departure is offered to expatriate families if there is time available, and followed up with more language training in the host country. Inpatriates in Sweden, and especially their spouses, will from now on be offered a network support through a local project, called Win, organized by the West Sweden Chamber of Commerce and Industry. Within this project, various support activities, network contacts, and society-related information is provided, and many spouses occupy themselves by working voluntarily in the project. This project has not been fully tested and evaluated by SKF yet since no inpatriates have arrived in Sweden since SKF Sweden joined the project, but is expected to be able to provide the necessary initial support and a social network of inpatriates and inpatriate spouses in other Swedish MNCs. However, this is a local initiative in which SKF Sweden is part, and such support is not provided on a global basis, even if some rather similar support services are found in some SKF organizations abroad. The SKF Group has included in its policy that such support should be provided to expatriate families by the receiving organization, but it is often difficult to convince organizations in other cultures of the necessity of such support.

In SKF Sweden, the country coordinator meets with expatriates and their spouses to discuss the international assignment prior to acceptance, and also meet with the spouses individually to reassure the acceptance of the spouse. This meeting with the spouses is seen as a crucial preparation since it offers the spouses an opportunity to withdraw from the assignment before too much investment have been made by SKF. It is also a suitable occasion to discuss potential sources of occupation, such as hobbies, clubs, etcetera, in the host country. The SKF Group also has in its policy that sending organizations should invite the spouse to the company prior to acceptance of the international assignment, which has been difficult to implement in certain cultures where the spouses do not have much to say about the work decisions of their husbands. Prior to the final acceptance of the international assignment,
expatriate families are also sent on pre-visits to the host country, ranging from two to seven days, in order to make sure that they can live comfortably in the specific location.

All expatriates are sent information from the SKF Group prior to departure, including information about the host country, expatriate conditions in that country, and information about an Intranet website on which expatriate can receive information needed. Such information published on the website could for instance include cross-cultural issues and tips not dealt with in organized training. They are also given a book about living in a foreign country.

The support received by expatriate and their families together with the understanding displayed by host organizations when arriving in the host country and organization has been found in surveys performed by the SKF Group to be the issue regarding international assignments most criticized by expatriates and their families. This is often due to a lack of knowledge of, and experience in, working and living in an unfamiliar country and culture in the receiving organizations. For home country organizations sending several expatriates, the country coordinators of these organizations are responsible for support and frequent communication with these expatriates. However, if the sending organization has few expatriates, Management Compensation & International Assignments at SKF Group headquarters is much more involved.

Expatriate families are further provided with one annual home visit, during which the expatriate shall visit the home organization. However, no specific activities are scheduled, and the respondents believe that the company could improve following up this company visits. Further, since most Swedish expatriate families choose to book their annual home visits during the summer, there is often not much operations in the home organization during these home visits. Expatriates are further encouraged to keep updated about current issues in the home country and organization, and are also sent a magazine for Swedish expatriates around the world during the first year of the assignment, which they can thereafter choose to subscribe to. The SKF Group used to employ a formal mentoring program. However, this is currently not employed since it was not perceived to be effective. The respondents admit, however, that informal mentoring relationships may very well exist in many cases. They further state that many expatriate families being sent out consist of very independent individuals that do not wish to receive such structured communication and support. Furthermore, the respondents try to meet with expatriates and their families when visiting SKF organizations abroad.

5.4.3 Repatriation Planning

Since timing of repatriation and job openings is difficult for the home organization, the first job position offered to repatriates is often not the most suitable one. However, surveys have indicated that the second position held by repatriates after a completed international assignment is perceived to be suitable taking into consideration their newly acquired skills and knowledge. The respondents admit that it does occur that repatriates leave the organization after repatriation due to dissatisfaction with the job position offered upon return, even though it is not that common. However, the expatriates are also told by the company to prepare on their own for their repatriation. Ultimately, it is in their best interest to take an active part in the repatriation planning in order to make the best possible out of their international assignment.
Expatriate families about to be sent out on international assignments are also informed about the problems they are likely to encounter when being repatriated into the home country. Many repatriates have stated issues such as the lack of interest showed by family, friends, and coworkers to make the readjustment into the home country more difficult. The respondents admit that improvements could be made by SKF regarding preparations in this area, but do not have any clear suggestions regarding actions or activities.

If the expatriates are sent out from a division within the SKF Group to the corresponding division in another country, the home country division is responsible for the repatriation planning. This is to be preferred since this division has knowledge about the competence of the individual, and often take on a personal responsibility for that individual. This repatriation planning can sometimes be initiated one year prior to the actual repatriation. However, if the expatriate is sent out to a host country organization without corresponding organization in the home country, the repatriation planning is the responsibility of the home country coordinator. This is more problematic since the country coordinator often does not have such a thorough knowledge about the expatriate’s competence and the needs of the organization. In such cases, the country coordinator must scan the home country organization for suitable job positions available at the time of repatriation. This can also be the case if the home organization has been restructured during the assignment of the expatriate.

Eight months prior to return, the expatriates are sent a message from headquarters in which expatriates are reminded to start thinking of whether they want to prolong the expatriate contract or be repatriated to the home country. If they wish to be repatriated, it is much their own responsibility to start contacting the home division in order to search for job openings and initiate the repatriation planning. In those cases where a job position cannot be found in the home division, HR Services can be deployed to help search for suitable job positions in the entire home organization. The need for organizational repatriation planning support differs widely from individual to individual. While some expatriates have already made sure that they will be provided with a suitable job position upon return, others are not that prepared and therefore contact headquarters or the country coordinator in order to receive assistance with job position planning. They are also sent a book dealing with repatriation issues, and a checklist of what to do and think of, prior to repatriation. At the same time, they are informed to schedule introduction and evaluation meetings.

No pre-repatriation training is offered to expatriates, nor any form of post-repatriation training or seminars. This is mainly due to the low frequency of repatriations. If SKF were to gather repatriated families for joint sessions, no more than one such session could be held per year, making it quite unnecessary and cost-inefficient. However, the respondents, and their equivalents in other countries, are available for repatriates if individual support is needed.

After repatriation, the country coordinator meets with the repatriate to evaluate the international assignment and the support provided in order to improve future expatriations. However, no formal competence development evaluation or monitoring is employed. The respondents further doubt the possibilities of establishing such a system. A database is kept of SKF employees, in which data such as international assignments, courses taken, and positions held are registered. No deeper data regarding actual competence development or evaluation of performance is registered. Further, such data base registration of information is to a great extent legally restricted. It would also be difficult to reach common competence and skills valuation criterion throughout the SKF Group, although it would be valuable for a specific
division to keep track of the development of their expatriates. The only competence monitoring of expatriates as of today is the data base registration of international assignments and positions held.

### 5.4.4 The SKF Group in Comparison

The SKF Group is also represented by one the respondents in the UPC cooperation among the largest Swedish MNCs, which was discussed in the previous two cases. Within this cooperation, problems with dual career issues are often discussed in order to develop a solution beneficial to the member MNCs. The SKF Group has even acquired an employee of another MNC in that group in order to provide the spouse of a SKF expatriate with a job position in the host country. In comparison with other Swedish MNCs, the respondent believes SKF to be good at preparing for the international assignment. What SKF may need to improve is the support provided during the actual assignment, as well as the control of which support is offered by sending SKF organizations in other countries, especially the support provided to the trailing spouse. This is especially difficult since expatriates are sent from so many countries.
6 Data Analysis

In this chapter, the data presented in previous chapter will be reduced and compared to the frame of reference. Each case will be dealt with in within-case analyses before comparing the four cases in a cross-case analysis. The structure of the analyses will follow the sequential order of the data presentation in the previous chapter, starting with career development, and continuing with expatriate support before ending with repatriation planning. No explanations, other than those provided directly by the respondents, of matches or mismatches when comparing data with the frame of reference will be provided. Since such explanations would be conclusive, these will instead be presented in the next chapter.

6.1 Within-Case Analysis of Case One: The Electrolux Group

As mentioned above, this section will analyze the data in the sequential order of career development, expatriate support, and repatriation planning.

6.1.1 Career Development

Regarding the statements by Black and Gregersen (1999) that MNCs should have long-term view on expatriation and employ expatriate assignments with focus on knowledge creation and leadership development, no clear matches were found since the respondent states Electrolux to have a short-term view on expatriation in which expatriates are sent to fill a current business need. However, Electrolux sometimes base the selection decision on a combination of a business need and individual employee development, even though development needs are rarely the only criteria on which the decision is based. Therefore, a partial match is considered to exist regarding the long-term career view on expatriation, but no match at all regarding the focus on knowledge creation and leadership development since this is rarely the main reason for expatriation. Further, career development is increasingly gaining importance in the selection process since the establishment of the Talent Management department.

Regarding the statements by Black and Gregersen (1999) and Fish and Wood (1994) that it is of crucial importance that both the expatriate and the MNC are clear about the reason for the expatriate assignment and the implications on the overall career of the individual, the respondent states the expatriates to be aware of both the underlying business need and their value to the organization since only the most suited employees are sent as expatriates. Expatriate assignments are rigorously informed about and applied for via an Intranet website. Therefore, a match with Fish and Wood’s (1994) statement that it is important that the expatriate know in advance what is expected of him or her on the assignment, as well as with Black and Gregersen’s (1999) statement that it is of crucial importance that both the MNC and the expatriate know the reason for the expatriate assignment, is considered to be found. However, no data was received regarding how clear expatriates are of career implications of an expatriate assignment, as stated important by Fish and Wood (1994). Regarding management of expatriates’ career expectations, as suggested by Stahl et al (2002), it is the formal responsibility of line management to discuss career implications with expatriates, and often lies upon his or her line manager. However, the respondent, holding responsibility for
international assignments ranging from one year, also discusses this issue with expatriates prior to departure. Since no specifications of how the expectations of the expatriates should be managed are provided by the authors, a match is considered to be found. Regarding provision of on-going career information, as suggested by Stahl et al (2002) and Fish and Wood (1994), the Talent Management department is responsible for upholding communication with the expatriate during the assignment in order to match their newly acquired skills with available job positions in the home organization. Furthermore, annual appraisal talks are held with the expatriates for the same purposes. Continuous review of expatriate performance, also suggested by Stahl et al (2002) is the responsibility of, and handled by, the sending line organization and the sending business unit’s HR department. Since no specific suggestions regarding responsibility or procedures are made by Stahl et al (2002), a match is considered to be found. The respondent stated international experience to be a necessity to reach the higher organizational positions since Electrolux has a lot of cross-border operations. However, regarding Lazarova and Caligiuri’s (2001) statement that it is important for the MNC to demonstrate organizational valuation of international experience, only a partial match is found since international experience is stated to be a necessity to reach the higher positions and thereby demonstrated through expressed qualification demands, but no data indicating how this valuation is demonstrated to employees not pursuing such positions was received. Matches and mismatches between the frame of reference and empirical data for case one are depicted in table 6.1 below.

Table 6.1: Within-Case Analysis of Case One: Career Development

<table>
<thead>
<tr>
<th>Frame of Reference</th>
<th>Empirical Match</th>
</tr>
</thead>
<tbody>
<tr>
<td>Long-term view on expatriation/long-term career planning</td>
<td>Partial</td>
</tr>
<tr>
<td>Focus on knowledge creation and leadership development.</td>
<td>No</td>
</tr>
<tr>
<td>Clear understanding of the reason for the expatriate assignment</td>
<td>Yes</td>
</tr>
<tr>
<td>Clear understanding of the career implications of the expatriate assignment</td>
<td>No Data</td>
</tr>
<tr>
<td>Managing career expectations of the expatriate</td>
<td>Yes</td>
</tr>
<tr>
<td>Provision of on-going career information</td>
<td>Yes</td>
</tr>
<tr>
<td>Continuous review of expatriate performance</td>
<td>Yes</td>
</tr>
<tr>
<td>Demonstrating organizational valuation of international experience</td>
<td>Partial</td>
</tr>
</tbody>
</table>

6.1.2 Expatriate Support

Francesco and Gold (1998) discuss expatriate support in terms of financial compensation as often including overseas premium, housing allowance, cost-of-living allowance, moving expenses, tuition for children’s education, home leave, and tax reimbursement payments. As mentioned in the frame of reference, these types financial compensations are much in accordance to the ones discussed by Dowling and Schuler (1990) as the balance sheet approach in which the expatriate salary is based on the individual’s home country salary with additional incentives and premiums. The Electrolux Group pays market-based salaries when possible. It is not seen as possible when the expatriate originates from a high salary country
and is to work in a host country with significantly lower salaries. Further, Electrolux prefer to offer more cost coverage for the expatriate rather than providing high premiums. Such cost coverage includes extra taxes, free housing, and moving and storage expenses. Electrolux further compensate expatriates according to a policy including compensations such as international schools for trailing children when necessary, one annual home visit trip per family member, and a spouse funding in which the trailing spouse receives a savings account in which the company place an annual percentage to be used either as pension savings or as capital to be used after the assignment. If the expatriate chooses to commute to and from the host country instead of moving there, Electrolux pays for the traveling expenses since these are lower than the cost of having the family living in the host country. The costly aspects of an expatriation are, according to Electrolux, upholding a pension level for the expatriate similar to the one in the home country, moving expenses, and housing costs. Considering the similarity between the financial compensation variables selected in the frame of reference and empirical data, all variables are considered to be matched. Overseas premium is only considered to be a partial match since Electrolux prefer to keep them rather low and instead provide more cost coverage. This cost coverage is further interpreted to be a match with cost-of-living allowances with the purpose of providing coverage for extra expenses incurred in the host country. However, the market-based salary, the spouse funding, and upholding of the expatriate’s pension level were not anticipated in the frame of reference.

Regarding formal mentoring, as discussed by Yurkiewicz and Rosen (1995), Harvey et al (1999), and Feldman and Bolino (1999), Electrolux does not have, and never has had, a formal mentoring program. This is not considered to be necessary since the rather low number of expatriates makes the already existing organizational initiatives sufficient. Post-arrival cross-cultural training, as discussed by Black (1992) and Selmer et al (1998), is often discussed and offered, even though not widely used. Such post-arrival cross-cultural training is also offered to the trailing spouse, as suggested by Fish and Wood (1997), and to the trailing children, as suggested by de Leon and McPartlin (1995). On-site language training, as suggested by Dowling and Schuler (1990), is always offered to the expatriates and the trailing families. A cost limit of SEK 15,000 is set for each family member. However, the expatriates do not have such a cost limit. Rather, the amount of on-site language training offered to expatriates is decided based on the individual need and progress of each expatriate.

Electrolux does not employ any form of host-country mentoring or HCN network, as suggested by Black and Gregersen (1991), nor is business involvement established or job opportunities provided for the spouse, as suggested by Fish and Wood (1997). De Leon and McPartlin (1995) also suggested the establishment of a network of past and present expatriate children and having professional assistance and counseling available for trailing children. Electrolux tries to provide contact with an expatriate family in, or recently repatriated from, the host country, preferably with the same number of children in the same ages. Since this is not exclusively intended for expatriate children, nor is an actual network, no match is considered to be found. However, professional assistance and counseling is not automatically provided for trailing children, although Electrolux has a host-country consultancy firm hired to evaluate the needs of the family and provide with additional services needed. Therefore, a partial match regarding the professional assistance and counseling can be argued.

Kraimer et al (2001) suggest that parent organization support during the expatriate assignment often include assistance with schooling for children, assistance in housing allocation, membership in clubs, rest and relaxation vacation leave, maintained communication, on-going
career counseling, psychological counseling, and in-country contractual services. Electrolux provides with education for children, pre-visits adapted to the needs of the expatriate family and organized either by the organization or local relocation firms, and company-initiated communication throughout the assignment. Membership in clubs, rest and relaxation leave, and psychological counseling was not mentioned as support practices, but may be offered if judged needed by the in-country contracted consultancy firm. Regarding on-going career counseling, it is much the responsibility of the Talent Management department to keep continuous communication with the expatriates in order to match their newly acquired skills with available job positions in the home organization. Furthermore, annual appraisal talks are held with the expatriates in order to evaluate their newly acquired skills and match them with organizational needs. Therefore, some form of on-going career counseling can be said to exist.

Additional findings not anticipated in the frame of reference were practical support offered, such as help with insurances, health care, applying for visas, getting gas and telephone lines running, et cetera. Electrolux also has apartments available in the home country if the family needs to be repatriated on short notice, although such failures are stated to be very rare. Furthermore, Electrolux has an Intranet website on which available positions are posted for application. The respondent stresses that the entire responsibility of career communication should not be placed upon the organization – the expatriate must take own initiative and search the Intranet for suitable and available positions back home. Further, expatriate families are encouraged to contact the organization on their own initiative if needed. A visualized comparison between the frame of reference and the data received from case one is provided in table 6.2 on the next page.

6.1.3 Repatriation Planning

The challenge of expatriate management is, according to the respondent, to keep the repatriated individuals within the organization. A successful expatriate assignment includes keeping the repatriate in the organization. Expatriate failures according to this definition has not lately been over six per cent, although this is still considered to be a high failure rate and needs for improvements regarding repatriation planning are identified by the respondents. Restructuring within Electrolux has led to that many expatriates cannot be repatriated into their original home organizations. These expatriates are offered a two years extension of their expatriate assignment, after which they have to choose between an ordinary employment in the host country or find another job in the home country. Therefore, no guarantee or agreement regarding the type of position the expatriate will be placed in upon repatriation, as suggested by Lazarova and Caligiuri (2001), can be made. For those expatriates intended to be repatriated into the home organization, pre-departure briefings and discussion during the assignment regarding repatriation issues are seen as important. Much of this responsibility is laid upon the Talent Management department, which is also responsible for taking the broader perspective of career development and expatriate development evaluation. Therefore, pre-departure repatriation briefings, as suggested by Lazarova and Caligiuri (2001), and continuous career-related communication during the assignment, as suggested by Lazarova and Caligiuri (2001), Baughn (1995), Black et al (1992), and Tung (1988) is considered to take place through Talent Management as an assigned unit to provide career guidance, suggested by Black et al (1992) and Tung (1988). However, it is further emphasized that the expatriate takes own initiative in upholding career communication and search the Intranet for
### Table 6.2: Within-Case Analysis of Case One: Expatriate Support

<table>
<thead>
<tr>
<th>Frame of Reference</th>
<th>Empirical Match</th>
<th>Additional Findings</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Financial Compensation</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overseas Premium</td>
<td>Partial</td>
<td>spouse pension, upholding of expatriate’s pension level</td>
</tr>
<tr>
<td>Housing Allowance</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Cost-of-Living Allowance</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Moving Expenses</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Tuition for Children’s Education</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Home Leave</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Tax Reimbursement Payments</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td><strong>Formal Mentoring</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Home-Country Mentor</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Host-Country Mentor</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td><strong>Post-Arrival Training</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cross-Cultural Training</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Language Training</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td><strong>Family Support</strong></td>
<td></td>
<td>expatriate family contact</td>
</tr>
<tr>
<td>Host-Country Mentor</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>HCN Network</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Involvement in Expatriate Assignment</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Job Opportunity</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Expatriate Children Network</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Professional Assistance and Counselling</td>
<td>Partial</td>
<td></td>
</tr>
<tr>
<td>for Expatriate Children</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Post-Arrival CCT for Family</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Assistance with Schooling</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td><strong>Miscellaneous</strong></td>
<td></td>
<td>apartments available in the home country, Intranet website with available positions posted, expatriates and their families are encouraged to take own initiative in contacting and upholding communication with the home organization</td>
</tr>
<tr>
<td>Assistance in Housing Allocation</td>
<td>Yes</td>
<td>apartments available in the home country, Intranet website with available positions posted, expatriates and their families are encouraged to take own initiative in contacting and upholding communication with the home organization</td>
</tr>
<tr>
<td>Membership in Clubs</td>
<td>No Data</td>
<td></td>
</tr>
<tr>
<td>Rest and Relaxation Vacation Leave</td>
<td>No Data</td>
<td></td>
</tr>
<tr>
<td>Maintained Communication</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>On-Going Career Counseling</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Psychological Counseling</td>
<td>No Data</td>
<td></td>
</tr>
<tr>
<td>In-Country Contractual Services</td>
<td>Yes</td>
<td></td>
</tr>
</tbody>
</table>
suitable and available positions back home. Since Talent Management is also responsible for spotting individual development needs and provide possibilities for such development, career planning sessions are assumed to be held prior to sending an individual on an international assignment, as suggested by Lazarova and Caligiuri (2001). Regarding career planning with the expatriate six to eight months prior to repatriation, as suggested by Tung (1988), no match can be identified since the data does not specify the timing or extensiveness of career planning sessions. As mentioned when analyzing the support practices of the Electrolux Group, no formal mentoring program is employed within the organization since no such need is identified. Therefore, no match exists with the suggestion by Baughn (1995), Lazarova and Caligiuri (2001), and Tung (1988) to have a parent company mentor to aid the expatriate with career development and repatriation issues. Regarding home visits to the home organization, as suggested by Baughn (1995) and Black et al (1992), discussions are held whether or not to standardize such visits. Currently, pre-visits are sometimes offered, but not in every case. Therefore, only a partial match can be argued. No pre-return training, also suggested by Baughn (1995) and Black et al (1992), was reported to be organized.

Vis-à-vis Lazarova and Caligiuri’s (2001) proposal of a reorientation program to inform the expatriates of changes occurred in the home organization, Electrolux has a checklist to follow regarding organizational orientation upon return. However, due to advanced communication technology, the expatriates are generally as aware of organizational changes in the home organization as the rest of the employees working there. The comparison between empirical data and frame of reference regarding repatriation planning is depicted in table 6.3 below.

Table 6.3: Within-Case Analysis of Case One: Repatriation Planning

<table>
<thead>
<tr>
<th>Frame of Reference</th>
<th>Empirical Match</th>
<th>Additional Findings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-departure repatriation briefings</td>
<td>Yes</td>
<td>communication technology generally makes expatriates as aware of organizational changes as home country employees, emphasis on expatriates’ own responsibility in upholding career communication and employing the Intranet to find suitable positions upon repatriation</td>
</tr>
<tr>
<td>Career planning sessions before departure</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Career planning sessions 6-8 months prior to repatriation</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Parent company mentoring</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Continuous career-related communication</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Assigned organizational unit providing career guidance</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Home visits during the assignment</td>
<td>Partial</td>
<td></td>
</tr>
<tr>
<td>Pre-return training</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Position upon repatriation guarantee/agreement</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Reorientation program about changes in the company</td>
<td>Yes</td>
<td></td>
</tr>
</tbody>
</table>
6.2 Within-Case Analysis of Case Two: Scania

Similar to the previous section, this section will analyze the data in the sequential order of career development, expatriate support, and repatriation planning.

6.2.1 Career Development

Considering the long-term view on expatriation and focus on knowledge creation and leadership development, as stated by Black and Gregersen (1999), a partial match were found since Scania send out expatriates to fill current business needs without career development purposes, but also has a program called “Personal Enhancement Program” in which hot potentials are sent out as part of their career development. Even though the expatriate recruiters within Scania have the responsibility of taking a broader career development perspective when selecting expatriates, the respondents do not believe such a perspective is fully functioning today. Regarding Black and Gregersen’s (1999) as well as Fish and Wood’s (1994) statements that both the MNC and the expatriate must have a clear understanding of the reason for the expatriate assignment, as well as its effect on the overall career of the expatriate, the respondents believe both the organization and the expatriates to be clear about the underlying reason for, and responsibility during, the expatriate assignment. However, even though career implications are discussed with the expatriates prior to acceptance and departure, the respondents find it difficult to manage expatriates’ expectations regarding career implications of an international assignment. Therefore, a match is considered to be found regarding the understanding of the reason for the expatriate assignment, but not regarding the mutual understanding of the effect of the expatriate assignment on the overall career development of the expatriates since expatriates tend to have too high expectations. Although not very successful, Scania does take actions to manage the career expectations of the expatriates through discussions about career implications prior to the expatriate assignment. A match is therefore found with the discussion by Stahl et al (2002) that MNCs should employ practices such as managing career expectations.

No data regarding provision of on-going career information, as suggested by Stahl et al (2002) was received other than that Scania encourages the expatriates to take own initiative in keeping in touch with the home organization in order not to be forgotten. Further, the communication between the home organization and the expatriate during the assignment is business related rather than career related. A match with the statement by Stahl et al (2002) is not found since no data indicated the provision by the MNC of specific on-going career information. Regarding the continuous review of expatriate performance, as suggested by Stahl et al (2002) and Fish and Wood (1994), the recruiting officers have the main responsibility since they are also responsible for finding a suitable position upon repatriation, and databases are used in order to keep track of the development of every individual. Hence, a match is considered to be found.

Lazarova and Caligiuri (2001) stated that it is important for the MNC to demonstrate organizational valuation of international experience. International experience is stated to the employees to be a clear advantage in order to climb the organization of Scania, although it is not a prerequisite. Furthermore, approximately nine out of ten top managers within Scania have experiences of working abroad. However, since no data indicated any demonstration of organizational valuation for those individuals not aiming to reach higher positions in the
organization, only a partial match is considered to be found. Matches and mismatches between the frame of reference and empirical data for case one are depicted in table 6.4 below.

Table 6.4: Within-Case Analysis of Case Two: Career Development

<table>
<thead>
<tr>
<th>Frame of Reference</th>
<th>Empirical Match</th>
</tr>
</thead>
<tbody>
<tr>
<td>Long-term view on expatriation/long-term career planning</td>
<td>Partial</td>
</tr>
<tr>
<td>Focus on knowledge creation and leadership development.</td>
<td>Partial</td>
</tr>
<tr>
<td>Clear understanding of the reason for the expatriate assignment</td>
<td>Yes</td>
</tr>
<tr>
<td>Clear understanding of the career implications of the expatriate assignment</td>
<td>No</td>
</tr>
<tr>
<td>Managing career expectations of the expatriate</td>
<td>Yes</td>
</tr>
<tr>
<td>Provision of on-going career information</td>
<td>No</td>
</tr>
<tr>
<td>Continuous review of expatriate performance</td>
<td>Yes</td>
</tr>
<tr>
<td>Demonstrating organizational valuation of international experience</td>
<td>Partial</td>
</tr>
</tbody>
</table>

6.2.2 Expatriate Support

Francesco and Gold (1998) discuss expatriate support in terms of financial compensation as often including overseas premium, housing allowance, cost-of-living allowance, moving expenses, tuition for children’s education, home leave, and tax reimbursement payments. As mentioned in the frame of reference, these types financial compensations are much in accordance to the ones discussed by Dowling and Schuler (1990) as the balance sheet approach in which the expatriate salary is based on the individual’s home country salary with additional incentives and premiums. Scania employs an expatriate salary system in which the expatriates are guaranteed a certain net income, and costs such as tax and social security contributions are paid by the company on behalf of the expatriate. Expatriate families are also offered free housing, one annual home trip per family member, schooling for children, moving expenses to and from the host country, as well as potential storage costs during the assignment and up to six months after return. Even though overseas premium was not specifically mentioned, it can be presumed to exist since data collected indicates that an expatriate receives a significantly higher salary during the expatriate assignment compared to the home country salary. Further, the expatriates receive a higher salary in order to compensate for the loss of spouse income, which could be regarded to match the cost-of-living allowance intended to uphold the quality of living of the expatriate family. Additional findings not anticipated in the frame of reference were the spouse pension including a health insurance and subsidized cars for expatriate families.

Regarding formal mentoring, as discussed by Yurkiewicz and Rosen (1995), Harvey et al (1999), and Feldman and Bolino (1999), Scania does not presently employ a formal mentoring program, even though discussion about developing such a program are being held. Currently, it is much the responsibility of the expatriate to build a network in the home organization to facilitate repatriation and relocation upon return. Post-arrival cross-cultural
training for the expatriate, as discussed by Black (1992) and Selmer et al (1998), as well as for the trailing spouse, as suggested by Fish and Wood (1997), and for the trailing children, as suggested by de Leon and McPartlin (1995), is in most cases not offered, although a few experiments to provide with such training have been initiated. Considering the rare occurrence of such post-arrival cross-cultural training, no match is considered to exist. On-site language training, as suggested by Dowling and Schuler (1990), is provided to the whole expatriate family without cost limitations. Such language training is not optional for the expatriates – they are required to make a serious attempt at learning the language. However, the trailing children are not always provided with language lessons in the host country language. If preferred, English are taught instead, or in combination with the host country language.

Scania does not employ any form of host-country mentoring or HCN network for the spouse, as suggested by Black and Gregersen (1991), even though they are informed about potential networks already existing in the area of assignment. Employment or job opportunity is not offered to the spouse, as suggested by Fish and Wood (1997) since it would be too expensive to provide with two employments for every expatriate position to be filled. De Leon and McPartlin (1995) also suggested the establishment of a network of past and present expatriate children and having professional assistance and counseling available for trailing children. No network for trailing children or the whole family is organized by Scania. However, professional assistance and counseling is available, not only to trailing children, but to the whole family, through an emergency call center to which the expatriate family can call if needed. At the call center doctors, insurance people, and therapists are available to help the expatriate family. Even though expatriates having to be withdrawn in advance are very few, Scania is aware of that some families are not satisfied with their situation abroad, which could have implications on the expatriates’ job performance. However, such a risk is considered to be minimized by rigorous preparations of expatriates and their families, and spouse support is stated to be an area in which further developments are emphasized.

Kraimer et al (2001) suggest that parent organization support during the expatriate assignment often include assistance with schooling for children, assistance in housing allocation, membership in clubs, rest and relaxation vacation leave, maintained communication, on-going career counseling, psychological counseling, and in-country contractual services. Scania takes care of education for trailing children. Children are either placed in international schools in the host country, or in boarding schools in the home country. In those cases where children are placed in boarding schools, Scania provides with additional travel compensation in order for the family to get together more than once a year. Accommodation is usually handled through local HR organization, and the family must live in an area perceived by Scania to be secure. Membership in clubs, as well as rest and relaxation leave, is offered to expatriate families in hardship-classified countries if such a need is perceived to exist. No on-going career counseling was stated to exist, and the respondents also stated that Scania must improve their communication with the expatriate during the assignment in order to keep the organization up-to-date with the progress and development of the expatriate. Psychological counseling can be provided through the emergency call center mentioned above. In-country contractual services are offered to expatriates in the form of consultants providing assistance with declaration. Further, ad hoc support is provided to expatriates. No company-initiated continuous communication exist with the purpose of supporting the expatriate family, and maintained communication other than business related between the organization and the expatriate is not very common. However, Scania encourage the expatriate families to call the organization if any need or problem arises.
Additional findings not anticipated in the frame of reference were that the department handling international assignments and expatriations is very service minded, and handle, or support the expatriate with, almost every practical detail outside work in order for the expatriate to be able to fully concentrate on his job responsibility from day one. This extensive service is motivated by the significant amount of income contributed from every unit sold. Scania also has a worldwide Intranet connection available for most Scania organizations abroad on which the expatriates can keep themselves updated about company news. The International Assignments department is further developing a website on which expatriates and their families will be able to find information and useful tips. A network for expatriate spouses is also planned to be available on the website. Expatriates are further encouraged to take own initiative in upholding the communication with their home organization since it is much in their own interest to be kept in mind. Scania also has an informal agreement with AstraZeneca, a large MNC with R&D headquarters in Södertälje, to provide an employed trailing spouse of an expatriate in the other MNC with leave of absence in order for the spouses not to be forced to permanently interrupt their career. Scania is also part of a cooperation, UPC, of the largest Swedish MNCs in which managers handling international assignments meet to discuss issues regarding expatriations and expatriate management. A development of this cooperation is foreseen in which the MNCs try to help each other by providing job opportunities for the trailing spouses of expatriates of the member MNCs. Included in this cooperation are, among others, the Electrolux Group, the Volvo Group, and the SKF Group. A visualized comparison between the frame of reference and the data received from case two is provided in table 6.5 on the next page.

6.2.3 Repatriation Planning

Pre-departure repatriation briefings, as suggested by Lazarova and Caligiuri (2001), are often, although only to a certain degree, held with expatriates. Most emphasis is placed on encouraging the expatriate to take own initiative in contacting the home organization prior to repatriation. Career planning sessions, also suggested by Lazarova and Caligiuri (2001) are only reported to be held within the Personal Enhancement Program. No career planning is incorporated in specialist or manager expatriate assignments. Therefore, only a partial match is found. Repatriation procedures are initiated by the company six to twelve months prior to repatriation. The recruiting officers start searching for a suitable position for the expatriate to be repatriated six months prior to repatriation, as suggested by Tung (1988). As mentioned regarding expatriate support, Scania does not employ any formal mentoring program, as suggested by Baughn (1995), Lazarova and Caligiuri (2001), and Tung (1988), although discussions of such are being held. It is much the responsibility of the expatriate to build a network in the home organization in order to facilitate repatriation and relocation upon return. Continuous communication, as suggested by Lazarova and Caligiuri (2001), Baughn (1995), Black et al (1992), and Tung (1988), is rather business related rather than repatriation related, although some communication regarding practical issues is held immediately before repatriation. However, since this communication is not continuous throughout the assignment, no match is considered to have been found. Nonetheless, Scania has an assigned organizational unit to provide career guidance, suggested by Tung (1988) and Black et al (1992), in that the expatriate recruiters are also responsible for taking the broader perspective of career development and handling evaluation and monitoring of competence development.

Expatriates are also encouraged to visit their home organization during their annual home visits, and some organizations even have a “home week” in which the expatriates spend one
week in the home organization without the family. However, this is mainly for business and operations purposes, and it is often difficult to convince the expatriates of the need for nurturing the network in the home organization. Therefore, since home visits to the organization are provided, but repatriation planning activities during these do not function as

Table 6.5: Within-Case Analysis of Case Two: Expatriate Support

<table>
<thead>
<tr>
<th>Frame of Reference</th>
<th>Empirical Match</th>
<th>Additional Findings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overseas Premium</td>
<td>Yes</td>
<td>spouse pension including a health insurance, subsidized car</td>
</tr>
<tr>
<td>Housing Allowance</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Cost-of-Living Allowance</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Moving Expenses</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Tuition for Children’s Education</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Home Leave</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Tax Reimbursement Payments</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td><strong>Financial Compensation</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Home-Country Mentor</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Host-Country Mentor</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td><strong>Formal Mentoring</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cross-Cultural Training</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Language Training</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td><strong>Post-Arrival Training</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Host-Country Mentor</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>HCN Network</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Involvement in Expatriate Assignment</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Job Opportunity</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Expatriate Children Network</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Professional Assistance and Counselling for Expatriate Children</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Post-Arrival CCT for Family</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Assistance with Schooling</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td><strong>Family Support</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assistance in Housing Allocation</td>
<td>Yes</td>
<td>worldwide Intranet connection with company news, expatriate website under development including spouse network, expatriates are encouraged to take own initiative in upholding communication, informal agreement with AstraZeneca, UPC cooperation</td>
</tr>
<tr>
<td>Membership in Clubs</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Rest and Relaxation Vacation Leave</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Maintained Communication</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>On-Going Career Counseling</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Psychological Counseling</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>In-Country Contractual Services</td>
<td>Yes</td>
<td></td>
</tr>
</tbody>
</table>
well as intended, only a partial match with the suggestion by Baughn (1995) and Black et al (1992) to provide with home organization visits to facilitate repatriation can be argued. Even though expatriate families are sent material to prepare for repatriation, no pre-return training, suggested by Baughn (1995) and Black et al (1992), was reported to be organized.

Specialist sent out as expatriates to educate foreign personnel are brought back into the organization holding a similar position as before the assignment. However, for managers sent out to manage foreign organizations, and expatriates sent out within the Personal Enhancement Program for career development purposes, no such position guarantee or agreement was mentioned. However, considering the understanding regarding the positions of specialist expatriates, a partial match with the suggestion by Lazarova and Caligiuri (2001) regarding position guarantee or agreement can be argued. The need to emphasize to the expatriates the difficulties in monitoring competence development and providing a suitable position immediately upon return is considered to be important. Scania believe themselves to be one of the MNCs with the lowest repatriate turnover, but even though repatriate turnover is rather insignificant in relation to the total number of expatriates, it is still considered to be a problem facing the organization. Currently, only about 20 per cent of the total emphasis on expatriate assignments is placed upon repatriation planning.

No reorientation program was reported to be employed with the purpose of informing the expatriates about changes occurred in the home organization during the assignment, as suggested by Lazarova and Caligiuri (2001). However, Scania arranges a welcome home day twice a year for recently repatriated families. The comparison between empirical data and frame of reference regarding repatriation planning is depicted in table 6.6 below.

**Table 6.6: Within-Case Analysis of Case Two: Repatriation Planning**

<table>
<thead>
<tr>
<th>Frame of Reference</th>
<th>Empirical Match</th>
<th>Additional Findings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-departure repatriation briefings</td>
<td>Yes</td>
<td>emphasis on encouraging expatriates to take own initiative in initiating career-related communication, welcome home day twice a year</td>
</tr>
<tr>
<td>Career planning sessions before departure</td>
<td>Partial</td>
<td></td>
</tr>
<tr>
<td>Career planning sessions 6-8 months prior to repatriation</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Parent company mentoring</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Continuous career-related communication</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Assigned organizational unit providing career guidance</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Home visits during the assignment</td>
<td>Partial</td>
<td></td>
</tr>
<tr>
<td>Pre-return training</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Position upon repatriation guarantee/agreement</td>
<td>Partial</td>
<td></td>
</tr>
<tr>
<td>Reorientation program about changes in the company</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>
6.3 Within-Case Analysis of Case Three: The Volvo Group

As with the previous sections, this section will analyze the data in the sequential order of career development, expatriate support, and repatriation planning.

6.3.1 Career Development

In the Volvo Group, about 80 per cent of all expatriates are sent for business need purposes, while the remaining 20 per cent are either top managers being sent to different managerial positions around the world, or young potentials sent abroad for career development purposes. It is much the responsibility of the individual employees together with their line managers to identify the needs and benefits in terms of career implications of an expatriate assignment in the individuals’ overall career plan. The reasons for the expatriate assignments are most often very clear to both the MNC and the expatriate. Therefore, a partial match is considered to have been found with the statement by Black and Gregersen (1999) that MNCs should have a long-term view on expatriation and employ expatriate assignments with focus on knowledge creation and leadership creation. Further, a match is considered to have been found regarding Black and Gregersen’s (1999) and Fish and Wood’s (1994) statements that it is of crucial importance that both the MNC and the expatriate have a clear understanding of the reason for the expatriate assignment. However, only a partial match is considered to have been found regarding Black and Gregersen’s (1999) and Fish and Wood’s (1994) statements regarding the importance of a clear understanding of the effects of an expatriate assignment on the overall career of the expatriate. Discussions are held with the expatriates regarding career implications, but sufficient data was not received to be able to determine their actual understanding.

Stahl et al (2002) suggest the managing of expatriates’ career expectations. However, they do not specify the contents of such a practice, and since the Volvo Group informs the expatriates prior to departure that although they should not have too high expectations, international assignments could be beneficial to career development, a match is considered to have been found. Stahl et al (2002) as well as Fish and Wood (1994) further discuss practices such as on-going career information. The Volvo Group employs a formal mentoring program to handle frequent communication to facilitate repatriation. Hence, on-going career communication is part of the mentoring program, and a match is considered to have been found. However, Stahl et al (2002) also discussed continuous review of expatriate performance, but since the Volvo Group rarely monitors expatriate performance for organizational purposes, no match is considered to have been found. The career development of expatriates is stated to often be forgotten during the assignment, and the respondent stated the Volvo Group to need to focus more on the broader picture, consisting of selection, planning, and monitoring, as well as the role of the expatriate assignment in the overall career development of expatriated individuals. Regarding Lazarova and Caligiuri’s (2001) statement that it is important to demonstrate organizational valuation of international experience, only a partial match can be argued since both the former and the present CEO have stated international assignments to be a necessity and the vast majority of higher level managers have experiences of international assignments, but no data was received regarding the actual communication and demonstration throughout the organization about this issue. Matches and mismatches between the frame of reference and empirical data for case one are depicted in table 6.7 on the following page.
6.3.2 Expatriate Support

Francesco and Gold (1998) discuss expatriate support in terms of financial compensation as often including overseas premium, housing allowance, cost-of-living allowance, moving expenses, tuition for children’s education, home leave, and tax reimbursement payments. As mentioned in the frame of reference, these types of financial compensations are much in accordance to the ones discussed by Dowling and Schuler (1990) as the balance sheet approach in which the expatriate salary is based on the individual’s home country salary with additional incentives and premiums. The Volvo Group employs a salary system rather similar to the balance sheet approach as discussed by Dowling and Schuler (1990). Expatriate salaries are based on their current home country salary, in which the spendable part is adjusted using an average spendable level from the four most important Volvo Group countries, and thereafter making adjustments according to position level and family size. The spendable part is also adjusted in accordance to cost-of-living indexes for the host countries. Expatriates also receive an overseas premium, by Volvo called mobility premium, of 10 to 15 per cent. Expatriates assigned to hardship-classified countries also receive hardship compensation in the form of location allowance. Furthermore, the expatriate families are provided with free housing, although presently not including the running costs. If not already installed, the company pays for necessary house equipment. Moving expenses are fully paid for by the company. The expatriate families further receive a settling in allowance, not anticipated in the frame of reference, that the family can use for house product purchases besides the necessary equipment already paid for by the company. The Volvo Group is rather restrictive regarding club and recreational allowances, but provides with these if deemed necessary due to a tough environment. The company further pays for trailing children’s education and annual home visits for the expatriate family. Additional findings not anticipated in the frame of reference are pension allowance intended to uphold the pension level of the expatriate, a spouse pension fund in which SEK 30,000 is annually deposited, and the provision of a company car or a car allowance in order for the expatriate family to have a car in the host country.

The Volvo Group has a formal mentoring program, as suggested by Yurkiewicz and Rosen (1995), Harvey et al (1999), and Feldman and Bolino (1999), intended to uphold frequent communication between the expatriate and the home organization, provide the expatriate with

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Table 6.7: Within-Case Analysis of Case Three: Career Development

<table>
<thead>
<tr>
<th>Frame of Reference</th>
<th>Empirical Match</th>
</tr>
</thead>
<tbody>
<tr>
<td>Long-term view on expatriation/long-term career planning</td>
<td>Partial</td>
</tr>
<tr>
<td>Focus on knowledge creation and leadership development.</td>
<td>Partial</td>
</tr>
<tr>
<td>Clear understanding of the reason for the expatriate assignment</td>
<td>Yes</td>
</tr>
<tr>
<td>Clear understanding of the career implications of the expatriate assignment</td>
<td>No Data</td>
</tr>
<tr>
<td>Managing career expectations of the expatriate</td>
<td>Yes</td>
</tr>
<tr>
<td>Provision of on-going career information</td>
<td>Yes</td>
</tr>
<tr>
<td>Continuous review of expatriate performance</td>
<td>No</td>
</tr>
<tr>
<td>Demonstrating organizational valuation of international experience</td>
<td>Partial</td>
</tr>
</tbody>
</table>
useful tips and home organization news, as well as facilitate repatriation. The mentor is an employee in the home organization, most often in a superior position, selected by the expatriate, and approved by the organization before a written contract specifying the contents of the mentoring relationship is established. Post-arrival cross-cultural training, as discussed by Black (1992) and Selmer et al (1998), is not organized by the parent organization, even though some local organizations provide on-site cross-cultural training on their own initiative. However, since this is not a practice standardized for, and adopted throughout, the organization, a match is not considered to exist. The same applies for post-arrival cross-cultural training offered to the trailing spouse, suggested by Fish and Wood (1997), and to the trailing children, suggested by de Leon and McPartlin (1995). Dowling and Schuler (1990) suggested on-site language training. The Volvo Group offers up to 200 hours of language training per person, which can be spread prior to, and during, the expatriate assignment.

The Volvo Group does not employ any form of host-country mentoring or HCN network, as suggested by Black and Gregersen (1991), nor is business involvement established or job opportunities provided for the spouse, as suggested by Fish and Wood (1997). De Leon and McPartlin (1995) also suggested the establishment of a network of past and present expatriate children and having professional assistance and counseling available for trailing children. However, no data indicated such networks or professional assistance and counseling for trailing children to be provided. Nonetheless, the Volvo Group has a cooperation with an international health center in which qualified personnel is available for the expatriate family if a health problem should occur while on the assignment. Very few expatriates have been withdrawn from their assignments due to problems outside of work. However, in those cases where the expatriate assignment is terminated in advance, it is most often due to family problems.

Kraimer et al (2001) suggest that parent organization support during the expatriate assignment often include assistance with schooling for children, assistance in housing allocation, membership in clubs, rest and relaxation vacation leave, maintained communication, on-going career counseling, psychological counseling, and in-country contractual services. The Volvo Group provides the expatriate families with housing and schools and education for the children. Membership in clubs, as well as rest and relaxation vacation leave, is offered although not to a great extent. The mentoring program serves to uphold continuous communication between the expatriate and the home organization. Additional continuous communication does occur during the expatriate assignment, although mainly regarding administrative issues such as pension, insurances, health care, et cetera. No data was received regarding in-country contractual services and therefore no match was identified.

Additional findings not anticipated in the frame of reference were that most support offered during the expatriate assignment is of administrative nature, and include for instance assistance with home country pension or insurances issues. The Volvo Group also has an Intranet website under construction on which all necessary information from the organization will be available, as well as links to organizations such as insurance companies and banks. Furthermore, it is much the responsibility of the expatriate to maintain the communication with the home organization, and they are also encouraged to do so. A visualized comparison between the frame of reference and the data received from case one is provided in table 6.8 on the following page.
### Table 6.8: Within-Case Analysis of Case Three: Expatriate Support

<table>
<thead>
<tr>
<th>Frame of Reference</th>
<th>Empirical Match</th>
<th>Additional Findings</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Financial Compensation</strong></td>
<td></td>
<td>settling in allowance, pension allowance, spouse pension fund, company car or car allowance</td>
</tr>
<tr>
<td>Overseas Premium</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Housing Allowance</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Cost-of-Living Allowance</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Moving Expenses</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Tuition for Children’s Education</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Home Leave</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Tax Reimbursement Payments</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td><strong>Formal Mentoring</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Home-Country Mentor</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Host-Country Mentor</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td><strong>Post-Arrival Training</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cross-Cultural Training</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Language Training</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td><strong>Family Support</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Host-Country Mentor</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>HCN Network</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Involvement in Expatriate Assignment</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Job Opportunity</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Expatriate Children Network</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Professional Assistance and Counselling for Expatriate Children</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Post-Arrival CCT for Family</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Assistance with Schooling</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td><strong>Miscellaneous</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assistance in Housing Allocation</td>
<td>Yes</td>
<td>Intranet website under construction, expatriates are encouraged to take own initiative in upholding communication</td>
</tr>
<tr>
<td>Membership in Clubs</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Rest and Relaxation Vacation Leave</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Maintained Communication</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>On-Going Career Counseling</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Psychological Counseling</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>In-Country Contractual Services</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>
6.3.3 Repatriation Planning

Pre-departure repatriation briefings or career planning sessions, as suggested by Lazarova and Caligiuri (2001) was not specifically mentioned. However, considering that expatriates are informed before accepting the international assignments not to have too high expectations regarding job position upon return, as well as the existence of a rough career development plan followed up by appraisal talks, it is fair to assume that both pre-departure repatriation briefings and career planning sessions are held to a certain extent. Furthermore, no timing or extensiveness of repatriation planning activities during the expatriate assignment was mentioned. Therefore, no match with Tung’s (1988) suggestion to initiate repatriation procedures six to eight months prior to repatriation can be identified. However, the Volvo Group employs a formal home organization mentor program, as suggested by Baughn (1995), Lazarova and Caligiuri (2001) and Tung (1988). Continuous career-related communication, as suggested by Lazarova and Caligiuri, Baughn (1995), Black et al (1992), and Tung (1988), is held between the expatriate and the mentor. Repatriation related communication is also held between the expatriate and a department such as the HR department or line organization to which the expatriate will be repatriated. A formal responsibility of upholding such communication during the assignment is always included in the contract. Therefore, an assigned unit to provide career guidance to the expatriate, as suggested by Tung (1988) and Black et al (1992), is always present. However, expatriates are also encouraged to take own initiative in contacting and communicating with their home organization during the expatriate assignment in order not to be forgotten.

The Volvo Group offers all expatriates continued employment upon return, but does not specify the position the repatriate will occupy, as suggested by Lazarova and Caligiuri (2001). This would be very difficult since the company cannot in advance anticipate the knowledge and experiences acquired during the expatriate assignment, nor can guarantee that a position thought of as suitable even exist upon return. Many expatriates are repatriated into the same position occupied before the assignment, even though many repatriated individuals change to a more suitable job position within one year after repatriation. According to surveys performed by the Volvo Group, the reentry into the home organization is perceived by expatriates to be the most difficult due to difficulties in finding a suitable position upon return. Repatriate turnover, though, is surprisingly low. Possible explanations for this were, according to the respondent, company loyalty and the fact that employees can even change industry without leaving the organization. Expatriates are not offered any type of pre-repatriation training, as suggested by Baughn (1995) and Black et al (1992). However, if they need to visit their home organization prior to repatriation, also suggested by Baughn (1995) and Black et al (1992), to discuss their future job positions, this is paid for by the company. No specific activities are scheduled during the annual home visits of the expatriates, but they are encouraged to spend one or two days in their home organization in order not to be forgotten. Volvo International Assignment Management, VIAM, sometimes meet with expatriates on home visits as well, if wished for by the expatriate. An orientation seminar is held with the expatriate upon repatriation to inform about the current company and country situation, as suggested by Lazarova and Caligiuri (2001). Discussions are also held during this seminar regarding the personal situations facing the repatriates. A comparison between the empirical data and the frame of reference is visualized in figure 6.9 on the following page.
6.4 Within-Case Analysis of Case Four: The SKF Group

As with the previous sections, this section will analyze the data in the sequential order of career development, expatriate support, and repatriation planning.

6.4.1 Career Development

A partial match was found regarding Black and Gregersen’s (1999) statement to have a long-term view on expatriation and employ expatriate assignments with a focus on knowledge creation and leadership development. The SKF Group sends expatriates with a main focus on current business needs, although career development to a certain extent influences the decision. Career development purposes of expatriate assignments were more common a decade ago as part of a trainee program. Since a long-term career view on expatriation to a certain extent influences the decision to send an expatriate, a partial match is considered to be found, although no match at all is considered to exist regarding the focus on knowledge creation and leadership development since this is not the main focus of expatriations. However, the respondents state career development to be mainly the responsibility of the individual employee since international positions are announced to be applied for. Expatriates are believed to have a clear understanding of the reason for, and position to be filled during, the expatriate assignment, as stated important by Black and Gregersen (1999) and Fish and Wood (1994). However, regarding the statement by Black and Gregersen (1999) and Fish and Wood (1994) that a clear understanding of the international assignment’s effect on career development is crucial as well, no match was found since the respondents believe that many expatriates have too high expectations of career advancement upon return, and state that SKF needs to more clearly inform the expatriates of career implications. Since discussions are held to reduce the career expectations of the expatriates, a match is considered to have been found to the suggestion by Stahl et al (2002) to manage the career expectations of the expatriates.

Regarding on-going career information, as suggested by Stahl et al (2002) as well as Fish and Wood (1994), the home organization has the formal responsibility of providing such
information. However, no continuous review of expatriate performance, as stressed by Stahl et al (2002), is performed by the home organization since this is believed to be very difficult to do successfully. Only a partial match was found regarding the importance of demonstrating organizational valuation of international experience, as stated by Lazarova and Caligiuri (2001) since it is stated as very important, but not sufficient data was received to determine the extent to which this importance is communicated throughout the organization. A visualized comparison between empirical data and the frame of reference is provided in table 6.10 below.

Table 6.10: Within-Case Analysis of Case Four: Career Development

<table>
<thead>
<tr>
<th>Frame of Reference</th>
<th>Empirical Match</th>
</tr>
</thead>
<tbody>
<tr>
<td>Long-term view on expatriation/long-term career planning</td>
<td>Partial</td>
</tr>
<tr>
<td>Focus on knowledge creation and leadership development.</td>
<td>No</td>
</tr>
<tr>
<td>Clear understanding of the reason for the expatriate assignment</td>
<td>Yes</td>
</tr>
<tr>
<td>Clear understanding of the career implications of the expatriate assignment</td>
<td>No</td>
</tr>
<tr>
<td>Managing career expectations of the expatriate</td>
<td>Yes</td>
</tr>
<tr>
<td>Provision of on-going career information</td>
<td>Yes</td>
</tr>
<tr>
<td>Continuous review of expatriate performance</td>
<td>No</td>
</tr>
<tr>
<td>Demonstrating organizational valuation of international experience</td>
<td>Partial</td>
</tr>
</tbody>
</table>

6.4.2 Expatriate Support

Francesco and Gold (1998) discuss expatriate support in terms of financial compensation as often including overseas premium, housing allowance, cost-of-living allowance, moving expenses, tuition for children’s education, home leave, and tax reimbursement payments. As mentioned in the frame of reference, these types of financial compensations are much in accordance to the ones discussed by Dowling and Schuler (1990) as the balance sheet approach in which the expatriate salary is based on the individual’s home country salary with additional incentives and premiums. The respondents state the expatriate salary system to be built on the same principles as the balance sheet model used by the Volvo Group. The salary model used by the SKF Group is based on a classification of how much the individual would be compensated for the same position in the home country. To that amount, a mobility premium is added, and cost-of-living and international living standard adjustments are made. Expatriates assigned to hardship-classified countries further receive a hardship premium. SKF further pays for costs associated with moving to and from the host country, as well as housing costs. The respondents further state that, similar to the Volvo Group, SKF does not pay for running costs such as gas or electricity. The company also pays for necessary house equipment not already installed. Furthermore, education for expatriate children, one annual home visit per family member, and taxes are paid for by the organization. The SKF Group also pays for insurances and has a spouse pension contribution in which an annual amount is deposited to be used by the spouse as pension savings, which was not anticipated in the frame of reference.
Formal mentoring was suggested by Yurkiewicz and Rosen (1995), Harvey et al (1999), and Feldman and Bolino (1999), and Black and Gregersen (1991) further suggested that a host-country mentor should be provided to the trailing spouse. SKF does currently not employ any formal mentoring program since it has been employed but not deemed effective. Nor does the data received indicate any involvement of the spouse in the expatriate assignment or provision of job opportunities, as suggested by Fish and Wood (1997). Therefore, match can be identified. Post-arrival cross-cultural training, as discussed by Black (1992) and Selmer et al (1998), is generally not offered to the expatriates, nor the trailing families, as suggested by Fish and Wood (1997) and de Leon and McPartlin (1995). On-site language training, as suggested by Dowling and Schuler (1990), is offered to the whole expatriate family. A HCN network was suggested by Black and Gregersen (1991). A network support shall be provided to the expatriate family according to a company policy. However, this is not widely adopted due to difficulties for headquarters to convince organizations in other countries of the necessity of such support. Therefore, only a partial match with this statement can be argued. De Leon and McPartlin (1995) also suggested the establishment of a network of past and present expatriate children and having professional assistance and counseling available for trailing children. No such data was received, and therefore no match can be identified.

Kraimer et al (2001) suggest that parent organization support during the expatriate assignment often include assistance with schooling for children, assistance in housing allocation, membership in clubs, rest and relaxation vacation leave, maintained communication, on-going career counseling, psychological counseling, and in-country contractual services. The SKF Group provides with support regarding housing allocation, as well as education for children. In countries where deemed necessary, the company provides with membership in clubs and extra medical insurances, but no data indicating provision of rest and relaxation leave was received. Maintained communication with the expatriate is the formal responsibility of the home organization, and frequent communication and support is usually the responsibility of the country coordinators. However, if the sending organizations have few expatriates on foreign assignments, SKF headquarters is usually more involved. No data indicated any match regarding on-going career counseling, psychological counseling, or in-country contractual services. The respondents admit that expatriates and their families may very well face problem while abroad, although this is not reported to the company. Nonetheless, very few contracts are terminated in advance.

Furthermore, expatriates are encouraged to keep themselves updated about current issues in the home country and organization, and Swedish expatriates are also for one year sent a magazine for Swedish expatriates around the world, which they could thereafter choose to subscribe to. The SKF Group also has an Intranet website on which expatriates can find information such as cross-cultural issues and tips not dealt with in training. For expatriates who wish to be repatriated into the home organization after a completed assignment, it is much their own responsibility to initiate contact with the home organization in order to find a suitable job position. A visualized comparison between the frame of reference and the data received from case one is provided in table 6.11 on the next page.
Table 6.11: Within-Case Analysis of Case Four: Expatriate Support

<table>
<thead>
<tr>
<th>Frame of Reference</th>
<th>Empirical Match</th>
<th>Additional Findings</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Financial Compensation</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overseas Premium</td>
<td>Yes</td>
<td>insurances coverage, spouse pension contributions</td>
</tr>
<tr>
<td>Housing Allowance</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Cost-of-Living Allowance</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Moving Expenses</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Tuition for Children’s Education</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Home Leave</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Tax Reimbursement Payments</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td><strong>Formal Mentoring</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Home-Country Mentor</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Host-Country Mentor</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td><strong>Post-Arrival Training</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cross-Cultural Training</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Language Training</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td><strong>Family Support</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Host-Country Mentor</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>HCN Network</td>
<td>Partial</td>
<td></td>
</tr>
<tr>
<td>Involvement in Expatriate Assignment</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Job Opportunity</td>
<td>No</td>
<td></td>
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<tr>
<td>Expatriate Children Network</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Professional Assistance and Counselling for Expatriate Children</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Post-Arrival CCT for Family</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Assistance with Schooling</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td><strong>Miscellaneous</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assistance in Housing Allocation</td>
<td>Yes</td>
<td>extra medical insurances in countries where deemed necessary, expatriate magazine, Intranet website with useful expatriate information, expatriates are encouraged to take own initiative in contacting and communicating with the home organization</td>
</tr>
<tr>
<td>Membership in Clubs</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Rest and Relaxation Vacation Leave</td>
<td>No Data</td>
<td></td>
</tr>
<tr>
<td>Maintained Communication</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>On-Going Career Counseling</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Psychological Counseling</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>In-Country Contractual Services</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>
6.4.3 Repatriation Planning

Expatriate families are briefed prior to departure, as suggested by Lazarova and Caligiuri (2001) about problems likely to be encountered. However, no match can be identified with Lazarova and Caligiuri’s (2001) suggestion of career planning sessions. Career development through expatriate assignments lies to a large extent on every individual since available expatriate positions are posted for application. The respondents further state that SKF need to improve their information towards expatriates in order to tone down the expectations of career advancement through expatriate assignments. Repatriation procedures are initiated eight months prior to repatriation, although only to a certain extent including career planning sessions as suggested by Tung (1988). At that point in time, expatriates are asked whether they want to be repatriated or have their expatriate assignment prolonged. For those who wish to be repatriated, it is much their own responsibility to search for job openings and initiate repatriation planning, although HR Services is available if help is needed. No job position agreement or guarantee, as suggested by Lazarova and Caligiuri (2001) was reported to exist. Since the timing of repatriations and job openings is difficult for the organization, the first job position offered to repatriates is often not the most suitable one, and the respondents admit that it does occur that repatriates leave the organization after repatriation due to dissatisfaction with the job position offered upon return, although this is not common.

SKF does not employ any formal mentoring program, as suggested by Baughn (1995), Lazarova and Caligiuri (2001), and Tung (1998). Continuous communication with the expatriates to facilitate repatriation, as suggested by Lazarova and Caligiuri (2001), Baughn (1995), Black et al (1992), and Tung (1988), is the formal responsibility of the home organization to which the expatriate will be repatriated. However, if the expatriate is assigned to a host country organization without corresponding organization in the home country, the repatriation planning is the responsibility of the home country coordinator. The formal responsibility of the home country organization or country coordinator is further considered to match Tung’s (1988) suggestion to have an organizational unit assigned to help the expatriate with functions such as career guidance when a parent company mentoring program is not available.

During the annual home visits, the expatriates are told to visit their home organization, as suggested by Baughn (1995) and Black et al (1992), although no specific activities are scheduled. One contributing reason for this, at least regarding Swedish expatriates, is that they usually book their home visits during the summer when there is not much operations in the organization. No form of pre-repatriation training, as suggested by Baughn (1995) and Black et al (1992), is organized due to the low frequency of repatriations. Nor is any form of post-repatriation training or seminars offered for the same reason. No match is therefore considered to exist with Lazarova and Caligiuri’s (2001) suggestion to employ a reorientation program in which newly repatriated expatriates are informed about changes occurred in the organization during the assignment. However, individual support can be provided if needed. A comparison between the empirical data and the frame of reference is visualized in figure 6.12 on the next page.
6.5 Cross-Case Analysis

In this section, cross-case analyses of the four cases will be provided in the sequential order of career development, expatriate support, and repatriation planning.

6.5.1 Career Development

Regarding the first two variables, the Electrolux Group and the SKF Group stated long-term career development to influence the decision of sending an expatriate, but do not employ expatriations with a main focus on knowledge creation and leadership development. Scania and the Volvo Group send the majority of their expatriates to fill a current business need, but also employ expatriations with the main focus on long-term career development. All the cases studied reported themselves and their expatriates to have a clear understanding of the reason for the expatriate assignment. While Scania and the SKF Group believed their expatriates to often have too high expectations on career advancement following an expatriate assignment, no indications at all were given by the Electrolux Group and the Volvo Group. However, all case companies reported to take actions to clarify career implications in order to keep expectations on a realistic level. The Electrolux Group, the Volvo Group, and the SKF Group reported to provide on-going career information to the expatriate during the assignment. In Electrolux, the Talent Management department is responsible for upholding communication with the expatriate during the assignment in order to match their newly acquired skills with available job positions in the home organization. Furthermore, annual appraisal talks are held with the expatriates for the same purposes, and expatriates are also encouraged to take own initiative in searching the Intranet for posted available positions. The Volvo Group employs a formal home country mentoring program with the purpose of facilitating repatriation into the home organization and the finding of a suitable position for the repatriate, while in the SKF Group, the home organization has a formal responsibility of providing such on-going career information. In Scania, communication with the expatriate during the assignment is business related rather than career related, and expatriates are encouraged to take own initiative in keeping in touch with the home organization. Regarding the continuous review of expatriate

<table>
<thead>
<tr>
<th>Frame of Reference</th>
<th>Empirical Match</th>
<th>Additional Findings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-departure repatriation briefings</td>
<td>Yes</td>
<td>career development and repatriation planning is largely the responsibility of the individual expatriate</td>
</tr>
<tr>
<td>Career planning sessions before departure</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Career planning sessions 6-8 months prior to repatriation</td>
<td>Partial</td>
<td></td>
</tr>
<tr>
<td>Parent company mentoring</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Continuous career-related communication</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Assigned organizational unit providing career guidance</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Home visits during the assignment</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Pre-return training</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Position upon repatriation guarantee/agreement</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Reorientation program about changes in the company</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

Table 6.12: Within-Case Analysis of Case Four: Repatriation Planning
performance, the Electrolux Group and Scania reported such practice to be conducted. In Electrolux, it is the formal responsibility of, and handled by, the sending line organization and business unit’s HR department. In Scania the recruiting officers have the main responsibility of evaluating performance and development of the expatriates since these recruiting officers are also responsible for finding suitable positions upon return. Databases are also used to keep track of the development of every individual. The Volvo Group, on the other hand, rarely monitors the performance of expatriates for organizational purposes. The SKF Group reported continuous review of expatriate performance to be very difficult to do successfully. Therefore, no such practice is conducted. All case companies consider international experience to very important, although no clear indications of how this is communicated throughout the organizations were provided. Table 6.13 below provides an overview of the four cases as presented in the within-case analyses.

Table 6.13: Cross-Case Analysis: Career Development

<table>
<thead>
<tr>
<th>Frame of Reference</th>
<th>Case 1</th>
<th>Case 2</th>
<th>Case 3</th>
<th>Case 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Long-term view on expatriation/long-term career planning</td>
<td>Match</td>
<td>Match</td>
<td>Match</td>
<td>Partial</td>
</tr>
<tr>
<td>Focus on knowledge creation and leadership development.</td>
<td>No</td>
<td>Partial</td>
<td>Partial</td>
<td>No</td>
</tr>
<tr>
<td>Clear understanding of the reason for the expatriate assignment</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Clear understanding of the career implications of the expatriate assignment</td>
<td>No Data</td>
<td>No</td>
<td>No Data</td>
<td>No</td>
</tr>
<tr>
<td>Managing career expectations of the expatriate</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Provision of on-going career information</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Continuous review of expatriate performance</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Demonstrating organizational valuation of international experience</td>
<td>Partial</td>
<td>Partial</td>
<td>Partial</td>
<td>Partial</td>
</tr>
</tbody>
</table>

6.5.2 Expatriate Support

Regarding financial compensation, all case companies were found to provide overseas premiums, free housing, cost-of-living allowance, moving expenses, tuition for children’s education, one annual home leave per family member, and tax reimbursement payments. However, the Electrolux Group prefers to keep overseas premiums low, and instead offer more cost coverage due to taxation reasons. Some additional financial compensation, not anticipated in the frame of reference was also found. All companies studied provided with a spouse pension fund in which a certain amount of money was annually deposited to be used as pension savings. Scania also reported their spouse pension to include health insurance. The Electrolux Group and the Volvo Group further reported to pay contributions to uphold the expatriate’s pension level during the assignment. The SKF Group also pays for insurances. The Electrolux Group was the only case company reporting to base the expatriate salaries on market levels when possible. The other three case companies employ a home-country based salary to which premiums and incentives are added. The Volvo Group offers the expatriates a company car, or a car allowance. In similarity, Scania provides the expatriates with a
subsidized car. Finally, the Volvo Group also offers the expatriate families a settling in allowance.

The Volvo Group is the only case company employing a formal mentoring program, in which each expatriate selects a home organization mentor to be approved by the company. The Electrolux Group was the only case company reporting to offer expatriate families post-arrival cross-cultural training, although not often used. All case companies offer expatriate families post-arrival language training, although minor differences in extensiveness and cost limits exist.

None of the case companies provide the family with a host country mentor, nor is HCN networks for the expatriate families generally organized. However, Scania informs expatriate families of eventual already existing networks in the host country, and the SKF Group has a written policy stating such networks to be provided by the host organizations. None of the MNCs studied provide the trailing spouse with any involvement in the actual assignment, nor with job opportunity. However, Scania has an informal agreement with AstraZeneca to grant an employed trailing spouse of the other MNC’s expatriate with leave of absence during the assignment. None of the cases studied provide with an expatriate children network, although the Electrolux Group tries to establish contact with a family expatriated to, or repatriated from, the host country, preferably with the same number of children in the same ages. Regarding professional assistance and counseling for expatriate children, the Volvo Group and the SKF Group did not report any such practice. Scania, on the other hand, has an emergency call center with doctors and therapists available for the expatriate families to call if needed, and the Electrolux Group has a host country consultancy firm hired to evaluate the needs of the expatriate family and provide additional services needed. All MNCs studied assist the expatriate families with schooling for the children, as well as with their housing. The Volvo Group also has a cooperation with an international health center which expatriate families can contact if such a need arises.

Regarding company-sponsored memberships in clubs, no data was received from the Electrolux Group. Scania and the SKF Group stated to provide with memberships when needed due to a tough environment, while the Volvo Group stated that it is provided, although not often. The same applies for rest and relaxation leaves, with the exception that no data was received from the SKF Group. The SKF Group also offers expatriate families extra medical insurances when warranted by the environment. In Scania, no continuous communication with the purpose of supporting the expatriate family is initiated by the company. Instead, expatriate families are encouraged to contact Scania if a need or problem arises. The communication held between the expatriate and the home organization is business related rather than support or career related. In the Volvo Group, the formal mentoring program serves to uphold communication between the expatriate and the home organization, as well as providing ongoing career counseling. The main additional communication regards administrative issues such as pension, insurances, and health care. In Electrolux, continuous communication, as well as on-going career counseling, is the responsibility of the Talent Management department in order to match the newly acquired skills of the expatriate with suitable job openings in the home organization. Furthermore, annual appraisal talks are held. In the SKF Group, continuous communication with the expatriate is the formal responsibility of the home organization, and is often handled by the country coordinators. In Scania and the SKF Group, no on-going career counseling was reported to be conducted.
Regarding psychological counseling, this was not specifically mentioned by the Electrolux Group, but may be offered if deemed necessary by the in-country contractual consultancy firm. Scania does provide psychological counseling if needed through the emergency call center. Scania also provides in-country contractual services to expatriate families in the form of professional assistance with declarations. None of the other two MNCs studied reported to provide any psychological counseling or in-country contractual services. All MNCs studied stated withdrawal of expatriate families to exist, although rather insignificant. Table 6.15 on the next page provides an overview of the four cases as presented in the within-case analyses.

Additional findings, not anticipated in the frame of reference, except for those already discussed where apartments available in the home country for expatriate families of the Electrolux Group needing to be repatriated on short notice and Intranet websites with useful information for expatriates and their families, employed by all MNCs studied except for the Volvo Group which has such a website under construction. Further, the SKF Group has an expatriate magazine for Swedish expatriates around the world. All of the MNCs studied emphasized the responsibility of the expatriate to take own initiative to contact and uphold communication with the home organization during the assignment. Finally, Scania was the only MNC reporting to have a support cooperation with another MNC, although all MNCs studied are part of the UPC cooperation which indirectly helps them improve their support practices. The additional findings discussed are depicted in a separate table 6.14 below since it would not be possible to fit one table containing all variables on one page.

Table 6.14: Cross-Case Analysis of Additional Findings: Expatriate Support

<table>
<thead>
<tr>
<th></th>
<th>Case 1</th>
<th>Case 2</th>
<th>Case 3</th>
<th>Case 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spouse pension fund</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Expatriate pension contributions</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Free or subsidized car</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Insurance coverage/additional insurances</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Settling in allowance</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Establishment of expatriate family contacts</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Emergency or health center available to contact</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Apartments available in the home country</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Intranet website with useful expatriate information</td>
<td>Yes</td>
<td>Yes</td>
<td>UC*</td>
<td>Yes</td>
</tr>
<tr>
<td>Emphasis on expatriates’ own initiative in communicating</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Expatriate magazine</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Support cooperation with other MNCs</td>
<td>Partial</td>
<td>Yes</td>
<td>Partial</td>
<td>Partial</td>
</tr>
</tbody>
</table>

* UC = under construction
## Table 6.15: Cross-Case Analysis: Expatriate Support

<table>
<thead>
<tr>
<th>Frame of Reference</th>
<th>Case 1</th>
<th>Case 2</th>
<th>Case 3</th>
<th>Case 4</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Financial Compensation</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overseas Premium</td>
<td>Partial</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Housing Allowance</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Cost-of-Living Allowance</td>
<td>Yes</td>
<td>Yes</td>
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<td>Moving Expenses</td>
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<td>Tuition for Children’s Education</td>
<td>Yes</td>
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<td>Home Leave</td>
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<td>Tax Reimbursement Payments</td>
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<td><strong>Formal Mentoring</strong></td>
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<td>Home-Country Mentor</td>
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<td><strong>Post-Arrival Training</strong></td>
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<td>Language Training</td>
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<td><strong>Family Support</strong></td>
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<td>Host-Country Mentor</td>
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<tr>
<td>HCN Network</td>
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<td>No</td>
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<tr>
<td>Involvement in Expatriate Assignment</td>
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<td>No</td>
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<td>Job Opportunity</td>
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<td>Expatriate Children Network</td>
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<td>Professional Assistance and Counselling for Expatriate Children</td>
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<td>Post-Arrival CCT for Family</td>
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<td>Assistance with Schooling</td>
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<td><strong>Miscellaneous</strong></td>
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<td>Assistance in Housing Allocation</td>
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<td>Yes</td>
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<td>Membership in Clubs</td>
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<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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<td>Rest and Relaxation Vacation Leave</td>
<td>No Data</td>
<td>Yes</td>
<td>Yes</td>
<td>No Data</td>
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<td>Maintained Communication</td>
<td>Yes</td>
<td>No</td>
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<td>On-Going Career Counseling</td>
<td>Yes</td>
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<td>Psychological Counseling</td>
<td>No Data</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
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<td>In-Country Contractual Services</td>
<td>Yes</td>
<td>Yes</td>
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</tbody>
</table>
6.5.3 Repatriation Planning

All MNCs studied reported to hold pre-departure repatriation briefings, informing the expatriates and their families of what to expect upon repatriation. Regarding career planning sessions before departure, this was found to be conducted in the Electrolux Group and the Volvo Group, but not in the SKF Group. In Scania, career planning sessions are only held when expatriates are sent out as a step in their career development. In Scania, the repatriation procedures are initiated twelve to six months prior to repatriation, and recruiting officers start searching for suitable job positions for expatriates to be repatriated six months prior to return. Regarding the Electrolux Group and the Volvo Group, no timing nor extensiveness of career-related repatriation procedures were mentioned. The SKF Group initiates repatriation planning procedures eight months prior to repatriation, although career planning is mainly the responsibility of the expatriates themselves. The Volvo Group is currently the only MNC studied employing home country mentoring facilitating repatriation. In the Electrolux Group, the Talent Management department is assigned with a formal responsibility of upholding continuous career-related communication with the expatriate during the assignment and providing career guidance, although expatriates are also encouraged to take own initiative in upholding career communication and search for suitable positions posted on the Intranet. In Scania, no continuous career-related communication was reported to be conducted since most of the communication held regards business related issues. However, expatriates are encouraged to take own initiative in initiating and upholding career-related communication, and the recruiters are assigned with the responsibility of providing the repatriates with a suitable job. In the Volvo Group, continuous career-related communication are held through the formal mentoring program, but also through the line organization or HR department to which the expatriate will be repatriated. In Volvo, a written contract is always established outlining the responsibility to provide career-related communication and guidance, although expatriates are also encouraged to take own initiative. In the SKF Group, the home organization or home country coordinator has the formal responsibility of upholding continuous career-related communication and providing career guidance, although the expatriates own responsibility of career planning is emphasized.

The Volvo Group pays for home visits to the organization if needed to facilitate repatriation, and the SKF Group tells expatriates to visit their home organization during their annual home visit. Scania also tell expatriates to visit their organization during their home visits, although those visits are mainly for business purposes. Even though expatriates are encouraged to nurture their network in the organization during such visits, it is generally difficult to convince the expatriates of such a need. The Electrolux Group sometimes offer pre-visits to the organization, but not in every case. None of the MNCs offer the expatriates any form of pre-return training. Similarly, none of the MNCs guarantee the type of position to be held upon repatriation, with the exception of specialist expatriates being sent out by Scania to be repatriated into their original position. In Electrolux, this would be difficult due to restructuring, and Volvo offer an employment guarantee, but do not specify the position to be held. All MNCs studied reported difficulties in finding a suitable job for the repatriates immediately upon return. However, they also stated repatriate turnover to be rather insignificant in relation to the total number of expatriates, but indicated needs to further improve repatriation planning. Regarding reorientation programs to inform expatriate about changes occurred in the home organization during the assignment, the Volvo Group has a reorientation seminar to inform repatriates about current company and country situation, and the Electrolux Group has a checklist to follow, although communication technology generally makes expatriates as aware of organizational changes as home country employees. Scania and
the SKF Group does not offer any form of organized reorientation for repatriates. Table 6.16 below provides a visualized comparison between empirical data and the frame of reference, as presented in the within-case analyses. Main additional findings are also included in the table.

Table 6.16: Cross-Case Analysis: Repatriation Planning

<table>
<thead>
<tr>
<th>Frame of Reference</th>
<th>Case 1</th>
<th>Case 2</th>
<th>Case 3</th>
<th>Case 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-departure repatriation briefings</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Career planning sessions before departure</td>
<td>Yes</td>
<td>Partial</td>
<td>Yes</td>
<td>No</td>
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<tr>
<td>Career planning sessions 6-8 months prior to repatriation</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Partial</td>
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<td>Parent company mentoring</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Continuous career-related communication</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Partial</td>
</tr>
<tr>
<td>Assigned organizational unit providing career guidance</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Partial</td>
</tr>
<tr>
<td>Home visits during the assignment</td>
<td>Partial</td>
<td>Partial</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Pre-return training</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Position upon repatriation guarantee/agreement</td>
<td>No</td>
<td>Partial</td>
<td>No</td>
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<tr>
<td>Reorientation program about changes in the company</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

Additional Findings

Emphasis on expatriates’ own career responsibilities | Yes | Yes | Yes | Yes
7 Conclusions and Implications

In this chapter, conclusions and implications drawn from the research performed in this study will be presented. Findings will initially be presented in a general discussion, dealing with the areas of the three research questions, career development, expatriate support, and repatriation planning, in the context of expatriate assignments as a means for career development. Thereafter, each research question will be answered in a separate section. It is further important to consider that the findings and conclusions presented in this chapter are not intended to be regarded as generalizations. They are drawn from, and therefore applicable mainly to, the four cases studied. Implications for management, theory, and future research are further suggested in separate sections in the end of the chapter.

7.1 General Discussion

Much of the literature reviewed for this study is based upon high reported expatriate failure rates and high repatriate turnover rates, as discussed in the introduction chapter. It is worth mentioning that most of the research reporting such rates is conducted in North America, and the accuracy of these rates have even been questioned by North American researchers. Most criticism regards the definitions of expatriate failures for measuring purposes as only including withdrawal or turnover, and not lowered performance on the job or psychological conditions. However, in order to counteract high failure and turnover rates, it has been argued that companies managing expatriate assignments successfully need to view expatriate assignments with a long-term career view, uphold career-related communication with the expatriate before and during the assignment, and rigorously prepare for repatriation. Furthermore, numerous support practices to be conducted during the assignment has been proposed in order to prevent failures due to adjustment difficulties of the expatriate and the trailing family, as well as to provide assistance during adjustment difficulties.

During the research conducted in this study, it has been found that expatriate failure and repatriate turnover rates in the Swedish MNCs studied are significantly lower than the reported rates constituting a foundation upon which much of the earlier research reviewed in this study is based. Nevertheless, expatriate failure and repatriate turnover is still considered to be problems, although not of very significant proportions, needed to be dealt with.

Only two of the MNCs studied employs expatriate assignments with the main purpose of individual career development, although constituting a rather low share of the total number of expatriations. However, all MNCs studied take career implications of an expatriate assignment into consideration before selecting an expatriate to be sent on an assignment. Furthermore, all MNCs carefully emphasized the expatriates’ responsibility of their own career development, as well as of taking own initiative in upholding career-related communication to facilitate repatriation and relocation upon return. Much of the career-related practices regarding expatriation and repatriation proposed in the literature review are to a certain extent conducted in the MNCs studied, although often not as rigorously as suggested in the literature since more emphasis was found to be placed upon the responsibility of each individual. The emphasis on expatriates’ own responsibility of career development could be justified by the assumption that each and every employee striving to advance in an
organization must take a relatively high degree of own initiative. However, considering the large amount of money invested in expatriates, and the competence possessed by these expatriates, it should also be much in the interest of the MNC to retain these individuals within the organization. One of the MNCs even stated that only the most suited employees are sent out as expatriates. Since the expatriates probably have less difficulties in finding another organization to work for than the MNCs have of finding a new employee that matches the company experiences and competences of the expatriate, the MNCs should not place the complete responsibility of career development on the expatriates, but should also see to it that expatriates receive all the assistance and information needed in their development.

Regarding the support practices, it was found that most support offered by the MNCs studied during the expatriate assignment regards financial support or support with practical or administrative issues, and not so much support preventing adjustment difficulties as suggested in the literature reviewed. Also here are the expatriates and their families encouraged to take own initiative in contacting the organization if additional support is needed, and most adjustment support is provided on an actual need basis. However, it was suggested that expatriate families in many cases do not report such personal difficulties to the organization due to anxieties of expatriates to jeopardize a great development opportunity within the company. Therefore, the need for such preventing support may be greater than is noticed by the MNCs. During the actual expatriate assignment, the MNCs studied are found to have a well-developed compensation package, but improvements in supporting the psychological well-being of expatriate families, especially trailing spouses and children, can be argued for.

To comment in large upon the findings regarding expatriate management in the MNCs studied, current business needs are by far the most common reason for expatriations, although some consideration is also taken regarding career development of expatriate individuals. The MNCs are further perceived to be good at providing necessary support such as financial support and other practical support including, for instance, declaration assistance and schooling for children. They are also rather good at having a formal responsibility of upholding career-related communication and planning for repatriation appointed, although much of the practical responsibility of this is in practice delegated to the individual expatriate. Indications supporting the “out-of-sight, out-of-mind” phenomena was also found, in that the career development of expatriates is often to a certain extent forgotten during the expatriate assignment. Furthermore, additional support to facilitate the well-being and adjustment of the expatriate family is mainly provided on a need basis, and it is often the responsibility of the individual expatriates and their family to initiate such support. Regarding repatriation planning, all of the MNCs studied reported difficulties in providing the repatriates with suitable job positions matching their newly acquired skills and competences immediately upon return, and admitted to loose some of the repatriates due to this reason. They also indicated a need to further improve the repatriation planning in order to better match these newly acquired skills and competences with available job positions in the organization.

It was in the frame of reference assumed that the employment of expatriate assignments as a means for career development might be interrelated with expatriate support practices and repatriation planning. Although no such connections can be concluded, they might be existing. The rather limited employment of expatriations for career development purposes could, in such case, partially explain the lack of certain support practices and shortcomings in repatriation planning.
Considering the discussion above, no complete and fully functioning long-term career and competence development perspective on expatriation is perceived to exist within the MNCs studied. However, data received indicated an awareness of most of the shortcomings, and a large part of these are under discussion and development. Furthermore, the respondents proved to be very well acquainted with the problems and difficulties facing expatriate, expatriate families, and expatriate management. Problem discussions provided by the respondents illustrated to a large extent the same problem and difficulties demonstrated in the literature reviewed. The respondents further proved to be well acquainted with the expatriate management practices of other large MNCs in Sweden, mainly due to the UPC cooperation in which the managers with responsibility of international assignments in member MNCs meet to discuss expatriations and expatriate management practices. However, this cooperation was not further analyzed since it was perceived to be outside the area of the research questions.

7.2 Conclusions

In this section, conclusions more specific to each research area and answers to the research questions, as concluded from the study, will be presented in sequential order.

7.2.1 Career Development

As was stated in the frame of reference, the first research question is formulated:
How can Swedish MNCs’ employment of expatriate assignments as a career development practice be characterized?

As mentioned in the general discussion above, only two of the four MNCs studied employs expatriate assignments with the main purpose of individual career development, as part of in-house development and training. However, these expatriates constitute a rather small share of the total number of expatriates. One of the other MNCs studied did not state total absence of employment of expatriations for mainly career development reasons, but stated these expatriations to be rare.

The vast majority of the expatriations in the MNCs studied are first and foremost intended to fill a current business need, although career implications are to a certain extent taken into consideration when selecting the expatriate. Although formal responsibilities of career planning and communication exist, it is in much up to the individual to take own responsibility in his or her career development, as well as taking advantage of an expatriate assignment with the newly acquired skills and competences gained from it for career advancement purposes. Therefore, none of the MNCs studied were found to have a complete and fully functioning employment of expatriate assignments as a career development practice.

7.2.2 Expatriate Support

As stated in the frame of reference, the second research question is formulated:
How can Swedish MNCs’ expatriate support during the expatriate assignment be characterized?
Financial compensation and benefits offered the expatriates and their families by the MNCs studied is found to be well considered and developed. Expatriates are further found to be provided with extensive support with practical and administrative issues such as pensions, insurances, declarations, assistance with schooling and housing, and getting settled in the host country.

Furthermore, all MNCs studied provide with post-arrival language training for the whole expatriate family, but only one MNC stated to often offer post-arrival cross-cultural training. Only one of the four MNCs studied was found to adopt a formal mentoring program for expatriates, and none of the MNCs were found to provide the trailing spouse with a host-country mentor. Further, none of the MNCs studied provide with business involvement or job opportunity for the spouse. Similarly, none of the MNCs organize any form of support network for the trailing spouse or children, even though one MNC has a written policy that such networks shall be provided by the host organizations.

Support for the trailing family was furthermore, besides formal mentoring, found to be the type of support differing the most from frame of reference. Additional support is mainly provided on a need basis, and expatriates and their families are encouraged to take own initiative in receiving such support.

### 7.2.3 Repatriation Planning

As stated in the frame of reference, the third research question is formulated:

*How can Swedish MNCs’ repatriation planning be characterized?*

In all MNCs studied, difficulties in providing repatriates with suitable jobs immediately upon return were reported, and a need for improvements regarding repatriation planning was found. All the MNCs were found to hold pre-departure repatriation briefings, but only two were found to hold career planning sessions before departure, and one of the other MNCs holds career planning sessions for some of the expatriates, depending on the purpose of the expatriation. Most of the MNCs studied have formal responsibilities of providing continuous career-related information and career guidance, although all of the MNCs emphasize the expatriates’ own responsibility in initiating and upholding communication to facilitate and plan for repatriation.

All MNCs encourage expatriates to visit their home organization during annual home visits, or even offer the expatriate specific home organization visits, even though no scheduled repatriation planning activities are common practice. None of the MNCs studied provide with any pre-return training, and only one of the MNCs was found to guarantee the type of position to be held by some of the repatriated individuals. Two of the companies were found to provide with organizational reorientation for repatriated individuals.

However, even though repatriation planning is found to be an area in which improvements are warranted, and repatriates are often not found the most suitable position immediately upon return considering their development during the assignment, repatriation turnover was found to be relatively low in the MNCs studied.
7.3 Implications for Management

The main areas of improvements found in this study were the long-term perspective of expatriations and repatriation planning, as well as support of the trailing family during the assignment. Repatriation planning was generally indicated to need improvements, and career development was even stated to be, at least to some extent, forgotten during the expatriate assignment.

Although formal responsibilities of upholding career-related communication with the expatriate, and planning for relocation upon return are appointed, this is much the practical responsibility of the expatriates themselves. Even if the responsibility of the expatriates to shape their own career is justified, the organization should also consider what can be done in order to assist and motivate the expatriates to develop their career within the organization. One of the MNCs studied discussed a model in which meetings are held with the expatriate some time in advance of repatriation to brief the expatriate about what to expect regarding changes in the home country, as well as the personal situation likely to be experienced, and discuss the importance for the expatriate to make him- or herself visible to management in the home organization. This model further provides the tools for, and stresses the importance of, self-initiated career enhancement. Furthermore, not only the expatriates to be repatriated, but also line managers, are stressed with questions about how the newly acquired skills and competences of the individual will be deployed. This model seems to be a suitable solution in which the expatriate could be assisted and motivated to take own initiatives, and the organization, at the same time, is stressed to do what is in their power to take advantage of the investment made and the newly acquired competences of the repatriated individuals. Even if a model such as this is not implemented, it is important to make the line organization more involved in planning for repatriation and matching the competences of the individual to be repatriated with organizational needs.

Since the line organization tends to forget about the expatriate, and it is generally difficult to convince the expatriates of the importance to nurture their network in the home organization, the possibilities of organized activities for the expatriate in the home organization during home visits should be evaluated. Furthermore, instead of having an organization or a department formally responsible for upholding communication and planning for repatriation, it could be evaluated to have one individual responsible for communicating and planning repatriation together with an expatriate. This individual should preferably not have responsibility for more expatriates than possible to have a somewhat personal relationship to since such a personal relationship could constitute a source of none career-related support as well. The formal mentoring program presented in the data presentation and discussed in the data analyses is one example of how this could be performed.

Even if current business needs cannot be ignored, companies could benefit of having a more long-term perspective in which individual career development after repatriation is considered prior to expatriation, taking into consideration the development during the assignment. By following the suggestions provided above, the risk of forgetting such long-term intentions during the assignment could be minimized.

Regarding support of the trailing family, more could be done to prevent adjustment problems, rather than providing ad hoc support once the problems are already encountered. Several suggestions of such support are provided in the literature reviewed, and could for instance
include a support network, job opportunities or assistance with work permits. Furthermore, it could be suitable to have someone in the host country available for the expatriate family to contact and discuss potential problems with as a first step before the company is notified. Since this study found assumptions that problems encountered by the family during the assignment is often not reported to the company, having such a person or network available could be a useful source of support for the family providing tips, giving recommendations, or just listening. It could further be worth considering if the extensive practical support provided to expatriates and their families during expatriation makes readjustment to the home country and home organization more difficult. If company-initiated support during the repatriation is less extensive than during expatriation, chances are that expatriates feel less valued and appreciated upon return.

7.4 Implications for Theory

This study was performed in the area of expatriate management, and by striving for the purpose to gain a deeper understanding of Swedish MNCs’ use of expatriate assignments in individual career development, findings contributing to existing theory have been provided. These may serve as a foundation or background for future research within the area of expatriate management.

Most of the literature reviewed for this study originates from, and deals with, North America. This study has compared findings and suggestions in those studies in a Swedish environment, resulting in both matches and mismatches. The most significant difference found in this study, compared to the literature reviewed, is the proportion of failure rates and repatriate turnover. Much of the literature review illustrated failure rates and repatriate turnover severe problems, and reported early withdrawal of expatriates to be as high as 40 per cent (Webb and Wright, 1996). However, Tung (1982) found that recall rates of U.S. MNCs to be considerably higher than those of European or Japanese MNCs, a finding partially supported by this study since the respondents stated expatriate withdrawal and repatriate turnover to be rather low or insignificant compared to the total number of expatriates.

Furthermore, Black and Gregersen (1999) stated MNCs managing expatriations successfully generally adopting practices including a focus on knowledge creation and leadership development, as well as a well planned repatriation process. This study found focus on knowledge creation and leadership development within the MNCs of the study to be adopted to a very limited extent, and repatriation planning exists, although improvements are needed in order to be qualified as well planned repatriation processes. Nonetheless, expatriations within these MNCs are successful in that the expatriate failure rates and repatriate turnover are viewed as rather insignificant. Although not aiming to dismiss the statement by Black and Gregersen, the necessity of the practices for successful expatriations, proposed by the authors, could be questioned.

Regarding matching of specific variables, most of the variables are merely presented as suggestions by other researchers without statements of the extent to which they are adopted. Therefore, although this study illustrates the extent to which these suggestions are adopted within the MNCs studied, no comparisons can be made with earlier research regarding the extensiveness.
7.5 Implications for Future Research

During the work of this study, some topics interesting for future research have been discovered. First and foremost, the UPC cooperation reported of was not thoroughly examined since it was outside the frame of reference. Future research studying the functions and effects of this cooperation would be of interest, as well as research comparing the expatriate management practices of member MNCs with those of MNCs outside the cooperation. If this study were to be repeated on other MNCs in Sweden, not part of the UPC cooperation, interesting comparisons could be made.

This study took the perspective of the MNCs in career development, expatriate support, and repatriation planning. Considering the emphasis of the MNCs on the own responsibility of individual expatriates, future research studying the role of expatriates from their perspective would be interesting.

Further, communication technology was stated to make expatriates on assignments as aware of organizational changes as employees in the home organization. All the MNCs studied already employed, or were developing, an Intranet website on which expatriates can find useful information such as company news, tips, available job positions in the home organization, and links to banks and insurance companies. Considering the rapid development of communication technology in recent years, future research studying the role and affects of communication technology in expatriate management would be an interesting area of research. Specifically, it could be interesting to study the effects of communication technology on the monitoring of expatriate development, finding of suitable job positions, and the need for continuous communication during the assignment.

Finally, it was indicated during the study that the nurturing values of Swedish culture makes Swedish MNCs more care taking than, for instance, other more materialistic Western cultures where financial compensation is more emphasized. Similarly, it was indicated that the Europeans generally have less problems with international transfers than North Americans. It would therefore be interesting to study the role of national cultures in expatriation and expatriate management, for instance by employing Hofstede’s national cultures as a framework of cultures.
References


REFERENCES


Appendix A: Interview Guide

In this appendix, the interview guide is provided as constructed to facilitate the data collection. This interview guide was not intended to be strictly followed. Rather, it was intended to be used as a checklist to assure that no important aspects were left out during the interviews.

General Questions

- The respondent’s name and position within the company? How long experience within the area covered by the position?
- What is the responsibility of the department in which the respondent works?
- How many expatriates are currently employed within the MNC?
- In how many countries does the MNC currently have expatriates assigned?
- How can the typical expatriate be described? (age, time within the company, education, potential, …)
- How can the typical expatriate assignment be described? (in terms of length, responsibilities, country of assignment, …)
- How large part of all expatriate assignments are considered successful?
- How is a successful expatriate assignment defined?
- Does repatriation turnover constitute a problem for the MNC?

The Role of Expatriate Assignments in the Overall Career Development Plan

- What is the most common objective of sending expatriates?
- To what extent is career development influencing the decision to send an expatriate?
- To what extent are the expatriates aware of the implications of their assignment on their career development?
- How does the company facilitate career expectations of expatriates?
- How is expatriate performance monitored while on assignment?
- How is on-going career information provided to the expatriates while on the assignment?

Expatriate Support

- What kind of (financial) compensations are offered to the expatriates by the MNCs? (overseas premium/housing allowance/cola/moving expenses/education tuitions/home leave/tax reimbursement payments/…)
- Does the MNC have a formal mentoring program?
  - If yes – How can it be described?
  - If no – Why not?
- Is post-arrival training organized for the expatriate by the home office?
  - If yes – What kind of training? (culture-contrast training/fact-oriented training/role-plays/simulations/situation exercises/interactional training/on-site language training/adapted to different phases/….) Does the country of assignment influence the degree of post-arrival CCT offered/organized?
  - If no – Why not?
Does the MNC home office organize/offer any form of support to the trailing family during the foreign assignment?
  - If yes – How can it be described? (host-country mentor/HCN network/involvement in expatriate assignment/job opportunity/expatriate children network/professional assistance and counseling for expatriate children/post-arrival CCT for expatriate children/assistance with schooling/...)
  - If no – Why not?

Does the home office support the expatriates and the trailing families with housing issues in the host country?
  - If yes – How can this support be described?
  - If no – Why not?

How can the communication between the home office and the expatriate during the assignment be described?

How can career progress monitoring and communication during the assignment be described?

How can other kind of support offered to the expatriates be described? (membership in clubs/rest and relaxation leave/psychological counseling/in-country contractual services/...)

Repatriation Planning

How can repatriation planning activities prior to the expatriation be described?

How can the communication of repatriation issues between the home office and the expatriate be described?

Does the home office have an employee or a department responsible for continuous career planning counseling or guidance for the expatriate?
  - If yes – What is the responsibilities of such an employee/department?
  - If no – Why not?

Is the home office providing the expatriate with home visits during the assignment?
  - If yes – How frequently? Is the expatriate involved in any activities with the home office during such a home visit? If so – What activities?
  - If no – Why not?

Does the home office organize any pre-return training for the expatriates?
  - If yes – How can it be described?
  - If no – Why not?

Does the home office organize any other repatriation support practices to the expatriate during the assignment?
  - If yes – How can it/they be described? (parent company mentor/sponsoring function/...)
  - If no – Why not?

How can repatriation support practices upon return be described?

Does the home office take any actions to clarify individual and organizational expectations of the repatriation and post-repatriation period?
  - If yes – What kind of actions?
  - If no – Why not?