How Swedish MNCs Select their Expatriates

Three Case Studies

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Preface

This thesis was written during a ten week period and completed in January 2008. It has been a great challenge and a truly enriching experience. I have increased my knowledge of aspects connected to expatriate selection and also gained a deeper understanding of how Swedish MNCs select expatriates.

There are a few persons who have supported me and this thesis and I would like to take the opportunity to show them my gratitude. Firstly, I would like to thank the respondents, as they made this study possible due to their support in gathering the data. Secondly, I would like to express my gratitude to my supervisor, associate professor, Manucher Farhang, for his valuable advice and guidance throughout the process of writing this thesis. Finally, I would like to thank my family and friends for their love and support.

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Moa Streling
Abstract

International human resource management is an important component of MNCs’ global strategies and due to the complexity of managing international operations it is important to have the right people at the right place and at the right time. The purpose of this study is to gain a better understanding of how Swedish MNCs select their expatriate managers. With a qualitative and descriptive approach three case studies were conducted, looking at three Swedish MNCs by using in-depth telephone interviews. When looking at the motives for sending managers abroad as expatriates it was found that Swedish MNCs generally have the objective to develop the organizations abroad and implement informal control. Furthermore, it is common among Swedish MNCs to invest in expatriates if they believe that it can provide future advantages. Considering the expatriate selection process it was found that an informal expatriate selection generally is applied, where clearly defined characteristics of the selection process are hard to find. Finally, when looking at criteria for expatriate selection it was found that Swedish MNCs believe that the technical ability and the expatriate candidates’ previous experience are important criteria for expatriate selection.
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1 Introduction

This chapter will present an introduction to the area of research, starting with a background, followed by a problem discussion. Finally, the overall research purpose and research questions of the study will be stated.

1.1 Background

A country’s national boundaries are no longer boundaries for business (Ashamalla, 1998). There is a globalization of business occurring today, which is influencing the importance of organizations’ ability to compete at a much larger scale, in an increasingly hypercompetitive global market (Harvey & Novicevic, 2001). Some researchers state that organizations strive to fulfill key purposes through international assignments while others point to the strategic importance of such assignments (Black, Gregersen, Mendenhall & Stroh, 1999; Harris & Brewster, 1999). According to Black et al. (1999, p. 2) multinational corporations (MNCs) find that global assignments play an important role in “succession planning and leadership development; in coordination and control; and in technology, innovation, and information exchange and dissemination”. Furthermore, it has been suggested that the people are the key to competing successfully and previous research in the area of international human resource management (IHRM) continues to highlight the critical concern of expatriate management (Black et al., 1999; Collings, Scullion & Morley, 2007). Finally, other researchers note that having qualified global managers help organizations to differentiate their strategic choices (Harvey & Novicevic, 2001).

1.1.1 IHRM as a determining factor in MNCs global success

IHRM is an important component of firms’ global strategy and is often recognized as an influencing factor of success or failure of international business (Deresky, 2003). Phatak, Bhagat and Kashlak (2005) state that IHRM involves developing human resource capabilities to meet the diverse needs of multinational and global corporations. Ensuring high-quality management is critical due to the complexity of managing international operations (Deresky, 2003). Furthermore, in the competitive global economy, human resources are not as easy to duplicate as factors of production, and can therefore provide the source of competitive advantage (Phatak et al., 2005).

When looking at global assignments Black et al. (1999) have presented five basic dimensions of people management: recruit/select; train; appraise; reward and; develop. These dimensions build upon one another and develop into a management process (ibid). First, when it comes to recruiting and selecting, managers need to identify, recruit and appropriately position individuals within the organization. Phatak et al. (2005) suggest that it is a key process when corporations wish to bring new employees into their networks. Deresky (2003) indicates the importance of having the right people at the right place and at the right time by describing it as a key factor of success in international operations.

Secondly, training of the selected employees must be provided. Preparing individuals to work with individuals from other countries and cultures is necessary (Black et al., 1999). A few months after arrival to the host-country, people generally suffer from culture shock, and pre-departure training enables people to manage with such problems (Ashamalla, 1998). Phatak et al. (2005) note that managers who are sent abroad must understand the complexities of managing in different countries.
According to Black et al. (1999) the dimension of appraising concerns determining of how the employees abroad are doing, that is, measuring the employee performance. However, this can be difficult since success variables can differ across countries as well as the different organizational cultures (ibid).

The fourth dimension, rewarding, directs focus to the encouragement of specific performance behavior (Black et al., 1999). It would include rewards as well as more general compensation and different benefits. In order to retain and motivate international employees, compensation packages need to be provided (Deresky, 2003). Finally, according to Black et al. (1999), the development of managers needs to be addressed. Organizations need to consider how to maximize the managers’ potential, both in the short- and long-term. This includes planning for the repatriation, and how the global assignments influence the managers’ career, once they come back (ibid).

When looking at international staffing issues, operating and middle management employees are usually recruited locally. Upper management positions can be filled by parent-country nationals (PCN), host-country nationals (HCN) or third-country nationals (Deresky, 2003). The choice of who to hire is often influenced by the attitude of the top management team and the overall managerial staffing philosophy. According to Deresky (2003) there are four different philosophies. Firstly, there is an ethnocentric staffing approach, where people from headquarters are hired for abroad assignments, so called PCN or expatriates. Secondly, Deresky (2003) states that a polycentric staffing approach includes hiring local managers, that is, host-country managers. The third staffing approach is of a global perspective where companies search for the best managers, internally or externally, regardless their nationality. Finally, a regiocentric staffing approach can be adopted where recruiting occurs on a regional basis (ibid).

Firms’ strategic positions and future goals should influence the view on IHRM and how it is integrated into the company (Harvey & Novicevic, 2001). Harvey and Novicevic (2001) suggest that systems of human resource functions would help firms to make better collective decisions and increase consistency of operations across global networks. However, it has been suggested that there is often a mismatch between developed theory and what is actually practiced in organizations, and especially in the area of selection of qualified people (Harris & Brewster, 1999).

1.1.2 Recruitment and selection

Phatak et al. (2005) define recruitment as “the process of attracting a pool of qualified applicants for available positions” (p. 476) and describe selection as the process of choosing among the available candidates in order to find the skills, knowledge and abilities needed for the specific position. Dowling and Schuler (1990) define selection as “the process of gathering information for the purposes of evaluating and deciding who should be employed in particular jobs” (p. 47). However, previous research does not always look at these concepts separately, and it is sometimes looked at as a common aspect of staffing (Ashamalla, 1998; Collings et al., 2007; Harvey & Novicevic, 2001).

According to Deresky (2003) expatriates are often sent abroad when there is a need for high-technical capability and it can also be due to new international ventures where loyalty to the company is of greater concern than loyalty for the host country. Dowling and Welch (2004) state that the motives for using expatriates are linked to expectations of their specific roles
abroad. For example, some expatriates are used in order to control new operations, while others can be expected to help standardize a corporate language. Motives for using expatriates therefore affects the decision concerning who to send abroad and the preferable capabilities of this person (ibid).

Harvey and Novicevic (2001) state that the competitiveness of organizations will benefit from developing expatriate selection processes that involve multiple abilities of candidates and evaluations of their learning methods. This will create a broader perspective of the possibilities and opportunities of professional managers.

According to Thomas (2002) technical competence is one of the primary criteria which influence firms’ decision on who to send on foreign assignments. Other criteria can often be neglected, even though they might have a substantial influence on employee performance. It is believed that high technical competence results in a lower level of perceived risk for companies (ibid). This, in combination with the fact that technical skills are quite easy to measure, can be a reason for why firms put such great emphasis on technical competence as a selection criterion (Thomas, 2002). Black et al. (1999) state that focusing on technical skills can result in a rapid selection process, where candidates with similar technical skills and better cross-cultural skills can be overlooked when decision makers are trying to find candidates within the organization.

1.2 Problem discussion

Previous research has looked at the motives for using expatriates and how it can influence the selection of expatriates (Collings et al., 2007; Dowling & Welch, 2004; Harzing & Van Ruyssseveldt, 1995). MNCs approach the issues of staffing differently depending on internal and external motives for using expatriates.

While assignments abroad present great opportunities for organizations as well as individuals, they also present considerable risks. The cost of sending managers abroad can be three times as much as their normal salary, and failure can therefore be very expensive, not only due to immediate expatriate costs but also due to negative effects in host-country business (Harris & Brewster, 1999). Failure of expatriate managers is not only identified as premature return but also under-performance in the host-country (ibid). Aborted abroad assignments have been estimated to be between 20 to 50 percent, where personnel have an early return from assignments (Mendenhall, Dunbar & Oddou, 1987). These factors combined, have led to a growing need to internationalize managers (Harris & Brewster, 1999), and identifying and developing expatriate managers have become a necessity (Harvey & Novicevic, 2001). Understanding the selection process of MNCs could create consistency when considering who to select and therefore support the possibilities for future expatriates (Harris and Brewster, 1999).

Black et al. (1999) state that failure of expatriate managers can often be in direct relation to firms’ tendencies to rapidly select technically qualified candidates, without any deeper consideration of their cross-cultural communication and adjustment skills. Furthermore, some failures could be avoided if the firms consider the employees’ spouses and families, and their ability to adapt (ibid). Harvey and Novicevic (2001) suggest that there are studies which support selection approaches which do not only focus on skills directly linked to technical and functional capabilities, but also for example people’s global awareness, cultural empathy international negotiation skills and ethical understandings.
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Collings et al. (2007) suggest that MNCs generally underestimate the importance of strategically focusing on staffing in the global context and further understanding of the concepts involved is needed. According to Harvey and Novicevic (2001) more research is needed in order to find how selection processes can be developed systematically to support future goals of MNCs. Furthermore, Harris and Brewster (1999) state that previous research in the area of expatriate selection criteria is limited in the aspect of understanding how selection is actually practiced in MNCs. Finally, a lot of research in this area has looked at it from an American perspective, with limited research which reviews Europe, and especially Sweden. There is little research connected to Swedish MNCs’ view on the aspect of selecting expatriates, and this has been a major motive for the present study.

1.3 Overall purpose and research questions

The overall purpose of this thesis is to gain a better understanding of how Swedish MNCs select their expatriate managers. To satisfy the research purpose the following research questions are addressed:

**RQ1:** How can the MNCs’ motives for sending managers abroad as expatriates be described?

**RQ2:** How can the process of expatriate selection in MNCs be described?

**RQ3:** How can the criteria used by MNCs for expatriate selection be described?
2 Literature Review

The previous chapter presented the background and the problem discussion of the area of research, followed by the overall purpose and research questions of this thesis. This chapter presents a review of the relevant literature. The first sections will present theories connected to each of the research questions, followed by a conceptualization of the reviewed literature, which in turn will form the basis of data collection.

Theories related to the area of research were reviewed and the more established and recent were selected to present. The first section, 2.1, presents relevant theories connected to the motives for sending managers abroad as expatriates, section 2.2 presents theories related to the expatriate selection process and section 2.3 presents some theories connected to criteria for expatriate selection.

2.1 Motives for sending managers abroad as expatriates

Here, theories related to the motives of expatriation will be presented. There is a lot of previous research in the area of motives for sending managers abroad, and for this study some of the more recent and well established were chosen. Advantages and disadvantages associated with using expatriates will be looked at, as well as some of the expected roles of expatriates.

2.1.1 Advantages and disadvantages of using expatriates

There are advantages and disadvantages when using expatriates for business abroad (Deresky, 2003; Dowling & Welch, 2004; Phatak et al., 2005). According to Dowling and Welch (2004) the advantages include the aspect of organizational control and coordination. Expatriates are better equipped with an understanding of the values, attitudes, and priorities of the headquarters, (Phatak et al., 2005) as well as familiar to the products and procedures of the company (Deresky, 2003). According to Dowling and Welch (2004) expatriates contribute to the establishment of company objectives and policies in foreign subsidiaries. In comparison to HCN, expatriates are generally better equipped for training local workers in new technology as well as corporate systems (Hutchings, 2002). In addition Collings et al. (2007) suggest that organizations understand that the use of people they know and who are integrated in the organization, when positioning people abroad, is beneficial for them, and especially when looking at minimizing organizational problems. There is a level of trust between these individuals and their superiors, and it is more likely that they will strive for the organization’s best interest in comparison to host-country managers. Furthermore, international assignments can expand the competence of promising managers, due to increased international experience and can therefore be a motive for sending an expatriate abroad (Dowling & Welch, 2004).

The disadvantages of using expatriates include a low level of promotion opportunities for local managers, which can influence their work moral and motivation (Deresky, 2003). Expatriates inability to quickly adapt to another country and culture is also mentioned as a disadvantage (ibid). This can lead to ineffectiveness of the expatriate if it is not dealt with (Dowling & Welch, 2004). According to Hutchings (2002) expatriates are generally not aware of details concerning local labor markets, local education systems, specific practices and techniques of the country, and they often lack the proper language skills. Finally, the cost of sending people abroad is high and is therefore a discouraging factor when deciding to use
expatriates (Collings et al., 2007). The challenge for organizations is to find a way to accurately understand and measure the cost versus the benefits of using expatriates. The aspect of return on investment must be further investigated by organizations (ibid).

2.1.2 Roles of expatriates

Dowling and Welch (2004) state that there are a few reasons for sending managers abroad as expatriates connected to the intended role of the expatriate. The roles of an expatriate are outlined in Figure 2.1.

Figure 2.1: The roles of an expatriate

Source: Adapted from Dowling & Welch, 2004, p. 69

Figure 2.1 presents an overview of the different roles of expatriates, and how these roles affect and are affected by the home and host location. Firstly, expatriates can be used as agents of control. As stated earlier, expatriates are more likely to ensure subsidiary compliance by means of direct supervision and control (Dowling & Welch, 2004). According to Harzing (2001) expatriates can be used to directly or indirectly control personal and cultural issues within subsidiaries. When the control is direct Harzing (2001) labels the expatriates as “bears”, due to the level of dominance which is associated to this kind of control.

Corporate knowledge can be shared through international assignments. Therefore, organizations can use expatriates as agents of socialization, where they are expected to help the integration of corporate values and beliefs (Dowling & Welch, 2004). It is a more informal and indirect way of control. Harzing (2001) describe these expatriates as “bumble-bees” since they are expected to assist in transferring a common corporate culture. This creates a more decentralized organization.

Furthermore, expatriates can be used as network builders (Dowling & Welch, 2004). Internationally, fostering interpersonal linkages is of great importance and a way to implement informal control. It is also a way to transfer ideas and competence (ibid). Harzing (2001) uses the analogy of “spiders”, when describing expatriates as people who weave informal communication networks.

Dowling and Welch (2004) state that the role of an expatriate can be to expand organizational boundaries. Expatriates have a unique ability to collect market information, represent and promote the firm in the host-country, and influence important agents on the international market.
MNCs sometimes incorporate a standardized corporate language in order to simplify international interactions (Dowling & Welch, 2004). Expatriates can be used as language nodes, but this is not a role which necessarily has to be confined to expatriates.

Collings et al. (2007) suggest that although international assignments generally have more than one basic reason, there are three main motives for using expatriates. Firstly, if there are no suitable HCN available for a specific post, then expatriates may be used to ensure the desired quality of the job. As stated previously, an advantage of using expatriates is the opportunity for managerial development. According to Collings et al. (2007) developing individual managers through international experience, where they get a chance to nurture and build on their competence, can be seen as a motive for using expatriates. Finally, using expatriates can be a mean to achieve organizational development, aimed at, as Collings et al. (2007) state it, “increasing knowledge transfer within the MNC and modifying and sustaining organizational structure and decision processes” (p. 200).

It should be noted, according to Harzing (2001), that the different roles of an expatriate differ depending on the situation. Although expatriates with the role of bears often perform their role regardless of the circumstances, the need for bumble-bees and spiders are more influenced by the context of the situation. For example, in subsidiaries where there is a high level of local responsiveness, expatriates as spiders and bumble-bees become more important, used as tools of understanding and influencing the local beliefs and values (ibid).

### 2.2 Expatriate selection process

This section presents a review of the literature related to research question two, which concerns the process of selection. The process of selecting expatriates includes several aspects and there has been a lot of previous research within this area. Some studies are more established and were therefore chosen to be included. Other, more recent studies were selected as well. In this study the focus is on the process of selection and includes theories which are describing it as formal, informal or strategic processes. Different systems and processes will be presented. Furthermore, there will be a review of how selection in MNCs is influenced by different assignments and situations.

#### 2.2.1 Typology of selection systems

When looking at selection systems, organizations generally use pools of high potential employees, from which international managers are chosen (Harris & Brewster, 1999). Developed systems of evaluating these high potentials vary across organizations, where some are highly structured and formal while others are more of an informal character. However such assessments are usually based on three factors. Firstly, the firm’s needs are considered, based on business lines and strategic goals. Then external market conditions are looked at, and finally the match between employee and the value system of the top management (ibid).

Among MNCs, high potentials for international assignments are often proposed by their immediate supervisors and then evaluated by a group of senior managers from the place where the person works as well as parent-company personnel department (Harris & Brewster, 1999). These high potentials can be annually evaluated and later, as they have gained a certain level of maturity and management experience, positioned internationally.
Harris and Brewster (1999) have developed a typology of international manager-selection systems where they propose four different kinds of systems. They suggest that an open selection procedure is one where the available job positions are advertised and those with the right qualifications are interviewed, and selection decisions are then made by agreement among the selectors. A closed selection procedure is characterized by the direct choice or nomination of “suitable” candidates. Here selectors at corporate headquarters contact line managers concerning the desired candidates. Only upon agreement between headquarters and line manager, is the chosen person informed and Harris and Brewster (1999) state that selection interviews in this case is often a negotiation regarding terms and conditions of the assignment. The level of formality reflects the existence of formal and informal selections systems within the organization. Looking at these four factors combined, Harris and Brewster (1999) proposed four selection processes. An overview of these is presented in Figure 2.2.

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<td><strong>Open</strong></td>
<td>- Clearly defined criteria</td>
<td>- Less defined criteria</td>
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<td></td>
<td>- Clearly defined measures</td>
<td>- Less defined measures</td>
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<tr>
<td></td>
<td>- Training for selectors</td>
<td>- Limited training for selectors</td>
</tr>
<tr>
<td></td>
<td>- Open advertising of vacancy (internal/external)</td>
<td>- No panel discussions</td>
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<td></td>
<td>- Panel discussions</td>
<td>- Open advertising of vacancy</td>
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<td></td>
<td>- Recommendations</td>
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<tr>
<td><strong>Closed</strong></td>
<td>- Clearly defined criteria</td>
<td>- Selectors’ individual preferences determine criteria and measures</td>
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<td>- Clearly defined measures</td>
<td>- No panel discussions</td>
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<td>- Training for selectors</td>
<td>- Nominations only (networking/reputation)</td>
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<td>- Nominations only (networking/reputation)</td>
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Figure 2.2: Typology of international manager-selection systems

Source: Adapted from Harris & Brewster, 1999, p. 493

In the figure above, four selection systems are presented, and it shows an overview of the relation between open/closed selection procedures and formal/informal selection systems.

Firstly, an open/formal system of selection occurs when vacancies are advertised (both internally and externally) and selectors compare the candidates against a set of formalized criteria. This is followed by comparing their results to other selectors, in order to constrain the use of individual preferences (Harris and Brewster, 1999). This selection system creates a more systematic and consistent way of evaluating the candidates and a higher level of objectivity is achieved. A closed/formal system involves discussions among selectors where the candidates are evaluated by and matched to formal criteria. There is a lack of contact with the candidates and since closed selection procedures include only nominations, some suitable candidates may be overlooked. Networking and reputation are key features of this type of selection system.

Open/informal systems involve advertising available job positions to the employees but also focus on the recommendations of candidates, and the selection is therefore often arranged among the relevant managers. The selection decision is often made before any formal interview with the candidates, due to the reputations of the candidates. This system creates a tendency to select “clones” of the existing managers. It decreases the consistency of following certain criteria and can negatively influence the understanding and development of desired key characteristics of international managers. Finally, a closed/informal system is presented
LITERATURE REVIEW

by Harris and Brewster (1999). Here, due to the lack of formal systems and high focus on nominations, individual preferences of the selectors influence the selection. There is no debate concerning selection criteria and employees are not informed that the selection process is occurring. This results in inconsistent and incoherent selection systems, where effective international managers are not identified, due to the ever changing individual preferences (ibid).

2.2.2 Selection by Harris and Brewster’s “Coffee-Machine System”

Harris and Brewster (1999) state that although the process of selection has been widely researched it fails to describe how it is practiced in reality. They state that the selection system which is used in organizations is the so called “Coffee-machine system”. According to this system expatriate selection is initiated next to the coffee-machine where senior line manager colleagues spontaneously meet and casually discuss job related matters, where a comment or recommendation of a candidate for a certain abroad assignment might be presented. The next step is to initiate the organizational process of selection only to justify the decision that has already been taken, and other available candidates are usually overlooked. After reviewing the person’s job files, there will probably be a discussion between the candidate and managers involved, to see if the person in question is interested. If that is the case, an interview will occur without the specific characteristics of a selection interview, but rather a negotiation on terms of the assignment. The company’s IHR department will probably be contacted late in the process, and simply handle the practical issues, such as financial aspects, family related issues and so on (ibid).

This type of selection falls under the closed/informal system of selection. There is a limited pool of candidates, where only those who are well-known to some managers are considered. Harris and Brewster (1999) state that this presents a problem for competent candidates. It can be a problem for female candidates in particular, based on the fact that 85 to 95 percent of international managers are men. If selectors are forced to use a formal selection process, where assumptions of the selector are questioned, one can avoid this problem. While one can wish to strive for objective selection, organizations practice more of a subjective selection. Finally, this type of selection system affects the organization’s ability to retain a strategic view on how selection influences the organization. Instead of dealing with input and output of expatriates and how they are selected, IHR departments are limited to addressing financial and practical aspects of expatriation. According to Collings et al. (2007) the process of expatriate selection is influenced by the time span of the assignment. When addressing short-term assignments Collings et al. (2007) agree with Harris and Brewster (1999) that the selection process if often very informal, while it is a more formalized process for long-term assignments.

2.2.3 Harvey and Novicevic’s eight step process of expatriate selection

Harvey and Novicevic (2001) describe an expatriate selection process for global assignments, consisting of eight steps. They argue that a manageable procedure consisting of some important steps is needed in order to handle the information concerning critical components of selection. Harvey and Novicevic’s (2001) eight step process or selection is described below.

- **Step one: Identification of potential expatriate pool of candidates.**
  Pools of candidates simplify the initial step of the selection process. Managers can look for candidates both externally and internally, where internal assets present the value of
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corporate knowledge and trust, which can provide a means to extend control over the operations abroad. In addition, expatriates from within the organization are easier to identify, contact and attract to abroad assignments, their background information is more available, and the cost is generally lower, than of an external market candidate.

- **Step two: Assessment of IQ competencies of expatriate candidates.**
This step involves testing eight specific “IQs” of the candidates. These IQs are outlined in Figure 2.3.

<table>
<thead>
<tr>
<th>Analytical Intelligence</th>
<th>- Cognitive IQ: Measures the ability to reason, learn and think analytically.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>- Emotional IQ: The ability to bring out the effectiveness in others. The ability to show an appropriate state of emotion and respond to others’ emotions effectively.</td>
</tr>
<tr>
<td>Practical Intelligence</td>
<td>- Political IQ: The ability to use informal and formal power in a cautious and artful matter within the company, in order to achieve company objectives.</td>
</tr>
<tr>
<td></td>
<td>- Social/Cultural IQ: The extent to which one can recognize and understand roles, norms, routines and taboos in different settings.</td>
</tr>
<tr>
<td></td>
<td>- Organizational IQ: Having a detailed knowledge and understanding of how to get things done within the company.</td>
</tr>
<tr>
<td></td>
<td>- Network IQ: The ability to accomplish company goals by managing multiple organizational units and getting things done.</td>
</tr>
<tr>
<td>Creative Intelligence</td>
<td>- Innovative IQ: The ability to find unique ideas and solutions by innovative thinking.</td>
</tr>
<tr>
<td></td>
<td>- Intuitive IQ: Understanding how to quickly solve a problem or address certain situations without previous experience.</td>
</tr>
</tbody>
</table>

**Figure 2.3:** Eight managerial IQs
**Source:** Harvey & Novicevic, 2001, p. 75

Figure 2.3 presents the definitions of eight desired competencies of expatriate managers. Analytical, practical and creative intelligence are the three main categories of IQs, and each is divided into eight specific managerial IQs. According to Harvey and Novicevic (2001) candidates for expatriation must be tested on each of these IQs, and measure them in relation to each other. There are formalized tests to measure each of the IQs, which have been widely used and can be considered to be reliable (ibid).

- **Step three: Determination of learning styles of expatriate candidates.**
The individual learning styles of each of the potential expatriates must be measured in order to find the developmental needs of the candidate. This is an important aspect of determining the preferred learning style of future expatriate managers. There are tests which can be applied (Harvey & Novicevic, 2001).

- **Step four: Determination of thinking styles of potential expatriates candidates.**
Harvey and Novicevic (2001) state that the thinking styles of individuals influence the way people make actionable decisions. This is an important aspect of managerial competencies, and it is therefore important to understand how potential expatriate candidates think when faced with new situations where they have to decide what actions...
to take. International assignments often present unique situations, and routines to guide decision making are limited (ibid).

- **Step five: Determination of assignment task and its environments (internal/external).**
  Who to select for international assignments are highly dependent on the specific task of the assignment. According to Harvey and Novicevic (2001) marketing, and research and development expatriates are often given creative tasks, while the tasks of production expatriates are of a more coordinative nature. After deciding on the task one needs to consider the level of difficulty, as it increases depending on task complexity, ambiguity and incompleteness. External aspects of difficulty include cultural distance between the expatriate’s home-county and the host-country, as well as the perceived political risk and economical instability in the host-country. Internal aspects which affect the difficulty of a task include managing the complexity of organizations, such as joint ventures and strategic alliances. Another internal factor to consider is the attitude of the top management team in relations to the strategic issues in the host-country. One final factor, mentioned by Harvey and Novicevic (2001), which can influence the level of difficulty, is whether the company has had prior experience in the specific environment, and how successful it was.

- **Step six: Assessment of family characteristics.**
  Historically, the major reason for expatriate failure was problems related to the expatriate’s family (Harvey & Novicevic, 2001). Because of this, efforts to reduce family related problems have become of great importance, and naturally, when selecting expatriates companies need to consider families/spouses. A detailed analysis of the family life-cycle can be a way to reduce family related problems (ibid).

- **Step seven: Development of repatriation program prior to expatriation.**
  Managing repatriation is another step to take into consideration. Developing a basic plan of repatriation helps the expatriates and their families once they return from the abroad assignment. A repatriation plan is necessary in order to find out how complex the repatriation can be in specific cases, and also as a mean to inform the expatriates of their career life-cycle and ensure that the organization wishes the expatriates to have a positive re-entry experience (Harvey & Novicevic, 2001).

- **Step eight: Selection of expatriate candidates and assignments.**
  Matching the expatriates to assignments is the last step of the expatriation process, emphasizing that not all expatriates are suitable for all assignments. According to Harvey and Novicevic (2001) some final considerations need to be addressed: “the type of assignment, the country characteristics, the host organization culture/climate, and the nature of the task” (p. 82).

According to Ashamalla (1998) when selecting expatriates one must consider some specific aspects. Selection devices must be appropriately used, where instruments, tests, interviews and assessments need to calculate the possibility of success abroad. Using repatriates as helpful advisors for the candidates and selectors could be one way to develop the assessment. Secondly, the candidate’s self-evaluation is of importance. Ashamalla (1999) states that “one major outcome of a good selection procedure is the self-decision of the expatriate candidate to proceed with the assignment or opt out” (p. 56). Furthermore, the aspect of time devoted for the selection process influence its success. Adequate time is needed, but still, selection of expatriates is often hurried due to urgent staffing needs in operations abroad. Finally,
selection procedures should be in accordance with regular strategic evaluations of operations abroad, realizing IHR needs in advance, and long-term planning of recruitment.

2.3 Criteria for expatriate selection

This section presents a review of the literature related to research question three, concerning selection criteria. When looking at who to choose for abroad assignments previous research has developed several theories of what needs to be considered. For this study, theories including personal and organizational criteria were selected, focusing on some of the more established ones and also those which include rather broad criteria. Profiles of expatriates are reviewed, followed by factors and criteria which influence the selection.

2.3.1 Current expatriate profile

The view on how expatriate selection processes differ among MNCs, as well as the view on which selection criteria should be addressed (Harris and Brewster, 1999). The current profile of an expatriate is presented in Table 2.1.

<table>
<thead>
<tr>
<th>Category</th>
<th>PCN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender</td>
<td>Male (82%)</td>
</tr>
<tr>
<td>Age</td>
<td>30-49 years (60%)</td>
</tr>
<tr>
<td>Marital Status</td>
<td>Married (65%)</td>
</tr>
<tr>
<td>Accompanied by</td>
<td>Spouse (86%)</td>
</tr>
<tr>
<td>Duration</td>
<td>1-3 years (52%)</td>
</tr>
<tr>
<td>Location</td>
<td>Within Europe (35%)</td>
</tr>
<tr>
<td>Primary Reason</td>
<td>Fill a position</td>
</tr>
<tr>
<td>Prior International experience</td>
<td>30%</td>
</tr>
</tbody>
</table>

Source: Adapted from Dowling & Welch, 2004, p. 86

The table above shows the results of a survey that was conducted in the year 2002. About 180 MNCs participated in the study, and a majority of these had operations located in more than 130 countries. It should be noted that 77% of the responding firms had their headquarters located in the USA (Dowling & Welch, 2004)

2.3.2 Factors influencing the selection

Dowling and Welch (2004) state that determining appropriate selection criteria, is challenging for those in charge of selecting expatriates. Figure 2.4 shows some of the factors involved in the expatriation selection.
Figure 2.4 illustrates how the selection of expatriates is influenced by some criteria. According to Dowling and Welch (2004) these factors should not be looked at separately since they are related to each other. Technical ability, cross-cultural suitability and family requirements are the factors related to the individual, while country/cultural requirements, language and MNC requirements are influenced by the situation (ibid). Each of these factors are discussed below.

In order to perform the specific tasks of the abroad assignments, the selected person needs to have the required technical and managerial skills. The technical ability of candidates is a crucial criterion to consider (Dowling & Welch, 2004) and in practice, it is one of the most commonly used criterions (Collings et al., 2007; Harris & Brewster, 1999; Thomas, 2002). The assessment of a candidate’s technical ability is seen as relatively easy as it is often based on previous job performance, where evaluation records and statements form the person’s superiors are available. However, it must be remembered that past performance might not matter that much, when faced with solving specific problems in a new foreign culture and environment (Dowling & Welch, 2004).

Expatriates need to be able to work in new and often somewhat unfamiliar environments, and their cross-cultural suitability therefore needs to be considered (Dowling & Welch, 2004). According to Dowling and Welch (2004) important attributes to consider when assessing candidates’ cross-cultural suitability include cultural empathy, language skills, attitude toward new cultures, emotional stability and level of personal maturity. Ashamalla (1998) emphasizes cultural empathy, and the importance for international managers to appreciate and respect different aspects of other cultures. Furthermore, Hutchings (2002) focuses on the importance of expatriates’ ability to tolerate differences in race, beliefs, and cultures, including its customs and values. In practice, cross-cultural suitability is difficult to evaluate, since it has been hard to precisely define what factors should be included (Dowling & Welch, 2004). One could look at personality traits of the candidates, as well as their attitude toward foreigners and ability to relate to those of different cultural background. In addition MNCs often emphasizes the importance of expatriates’ abilities to create and nurture relationships, but the means to measure such abilities are not always seen as accurate or reliable (ibid).

It has been found that the expatriate’s family/spouse influence the expatriate’s success abroad (Avril & Magnini, 2007; Dowling & Welch, 2004; Harris & Brewster, 1999) and still few
MNCs focus enough on this aspect and families are not included in the selection process (Dowling & Welch, 2004). The adjustment of families can often be difficult, as families can suffer from the feeling of isolation due to inability to integrate into a new environment. The partner’s career, children’s disruption in education and the care of aging parents are aspects of family influences (ibid).

Country/cultural requirements must also be looked at when considering who to select for abroad assignments. Firstly, since the transfer of the selected expatriate can be stopped by the host government (Dowling & Welch, 2004). In order for the host government to issue work permits and visas needed for expatriates, firms are usually required to show that there are no HCN available. Legislations controlling employee transfers need to be considered, and changes concerning such legislations must be addressed. Furthermore, some assignments abroad mean that the expatriate, and its family, must move to remote or war-torn areas where living conditions are more difficult. Also, some countries do not issue work permits for women (ibid).

Dowling and Welch (2004) state that the language skills of candidates need to be considered as another selection criterion, and that it is often included in the aspect of cross-cultural ability. However, some researchers wish to stress the importance of language skills as it influence the effectiveness of cross-cultural communication (Ashamalla, 1998; Avril & Magnini, 2007; Dowling & Welch, 2004). Dowling and Welch (2004) state that the importance of adequate language skills differs depending on which kind of assignment it is and where it takes place. When adopting a corporate language which is different from the local languages, the language skills are viewed as crucial (ibid).

Furthermore, MNC requirements influence the selection decision and which selection criteria are considered. When considering expatriates for assignments in joint ventures, negotiation skills are emphasized, while using expatriates in order to train locals, training skills are very important. The duration of the assignment is another influencing factor, where family factors may not be as important if the assignment is for a shorter period (Dowling & Welch, 2004).

According to Harris and Brewster (1999) it has been suggested that international managers possess many of the same characteristic of managers working in less complex environments, but are in need of additional skills concerning how to handle the difficulties working internationally. Harris and Brewster (1999) suggest that some basic qualities for success abroad include technical competence, personality traits, and interpersonal skills. However, commonly used selection criteria continue to be technical competence and current job performance (Collings et al., 2007; Harris & Brewster, 1999; Thomas, 2002). In addition, Harris and Brewster (1999) suggest that selectors differ in mindset, concerning which selection criteria to consider and the aspect of what makes a successful expatriate manager.

According to Harvey and Novicevic (2001) adopting a competency-based expatriate selection would help companies develop global capabilities through increased knowledge transfer, and support some important strategic choices. They continue by stating that this type of selection would give expatriates the ability to understand the stable aspects of the global market, as well as the uniqueness of it. When the chosen expatriate is competent, in the aspect of possessing tacit and disturbed knowledge, costs of acquiring and coordinating market knowledge would decrease. As stated earlier in this chapter, evaluating managers according a set of eight IQs could be a way of finding a set of expatriate selection criteria.
Selecting expatriates by recognizing those who are eager to manage subsidiaries abroad could be beneficial for the organization (Harvey & Novicevic, 2001). According to Hutchings (2002) expatriate success or failure can to some extent be related to their motivation of going abroad.

According to Ashamalla (1998) expatriates are often faced with new environmental forces, and they therefore need to be aware of environmental constraints. In other words, international managers need to be able to identify and effectively function within an unfamiliar external environment. As stated previously interpersonal skills are of great importance (Harris & Brewster 1999), and includes the ability to communicate effectively and build trust (Ashamalla, 1998). According to Ashamalla (1998) other crucial qualities of expatriates include adaptability, flexibility, self-motivation, tolerance for uncertainty and ability to sense how world events impact the business.

According Avril and Magnini (2007) previous international experience should be review when selecting expatriates. Experience of foreign work generally provides individuals with an ability to generate strategies for adaptation (ibid) and it could also provide valuable knowledge of specific counties’ markets (Hutchings, 2002). Another selection criterion is the level of emotional intelligence, as described previously in Figure 2.3. Avril and Magnini (2007) emphasize the importance of this criterion and elaborate on its construction by describing some physiological and personal traits. These are displayed in Table 2.2.

<table>
<thead>
<tr>
<th>Emotional Intelligence</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Tolerance for ambiguity</td>
</tr>
<tr>
<td>- Low goal and task orientation</td>
</tr>
<tr>
<td>- Open-mindedness</td>
</tr>
<tr>
<td>- Tolerance for difference</td>
</tr>
<tr>
<td>- Communicativeness</td>
</tr>
<tr>
<td>- Empathy</td>
</tr>
<tr>
<td>- Flexibility</td>
</tr>
<tr>
<td>- Curiosity</td>
</tr>
<tr>
<td>- Warmth in relationships</td>
</tr>
<tr>
<td>- Motivation</td>
</tr>
<tr>
<td>- Self-reliance</td>
</tr>
</tbody>
</table>

Source: Adapted from Avril & Magnini, 2007, p. 55

In Table 2.2 the different traits of emotional intelligence are shown, and by behavioral interviewing one can assess the emotional intelligence of the selected candidate. The difference between traditional interviews and behavioral interviews is that the latter include situational hypothetical question about how the interviewee would respond, and past behavior questions concerning previous experience and the actions taken by the interviewee (Avril and Magnini, 2007). Avril and Magnini (2007) continue by stating that the ability to adapt to certain situations is a key success factor of expatriates. Here, their learning orientation, that is, “learn from experience, to seek opportunities to learn, to use and seek feedback to improve” (p.56), could reveal their adaptability. When deciding who to select for abroad assignments, Avril and Magnini (2007) suggest that organizations also need to consider factors such as the expatriate’s diet and exercise habits.

Finally, Collings et al. (2007) emphasizes the importance of evaluating and changing expatriate selection criteria due the dynamic environment of international business. Selection criteria need to reflect changes in types of assignments and their purposes.
2.4 Conceptual frame of reference

Here, a conceptualization of the reviewed literature will be presented. Key factors concerning each of the stated research questions will be emphasized in order to explain what will be studied. According to Miles and Huberman (1994) a conceptual framework describes, either in a narrative form or graphically, the main factors of a study and how these are related. Each section describes the conceptualization of each of the research questions, and the final section shows a summary of the conceptual frame of reference. The conceptualization will form the basis of the data collection and later of the data analysis.

2.4.1 RQ1: Motives for sending managers abroad as expatriates

When deciding to use expatriates for foreign assignments MNCs need to explore the reasons for sending persons to certain assignments abroad (Collings et al., 2007). While Collings et al. (2007) suggest that there is usually more than one reason for this it can often be connected to three basic reasons:

- No suitable HCN are available
- Developing managers through international experience
- Developing organizations

According to Dowling and Welch (2004) the intended role of the expatriate influence how selection of expatriates is practiced. By looking at the role of the expatriate one can find different motives for using expatriates. Dowling and Welch (2004) present five roles of expatriates:

- Agent of direct control
- Agent of socialization
- Network builder
- Boundary spanner
- Language node

For the purpose of the present study to theory of Collings et al. (2007) is most suitable and thus will be applied. Their theory is very recent and based on well established previous research. Discovering the intended roles of the expatriates will further investigate MNCs’ motives. The five roles described by Dowling and Welch (2004) will be applied. Their research is often cited when it comes to the area of motives for using expatriates.

2.4.2 RQ2: Expatriate selection process

When selecting expatriates there are several factors which need to be considered. Developed processes of expatriate selection support MNCs when deciding who to send on abroad assignments (Harvey & Novicevic, 2001). A typology of international-manager selection systems has been developed by Harris and Brewster (1999), where they describe four different ways of how MNC select their expatriates. It highlights the fact the process can be either informal or formal and it can be conducted in an open or closed manner (see Figure 2.2). These processes are described by showing some characteristics which include the following:

- Degree of defined criteria
- Degree of defined measures
- Degree of training for selectors
Furthermore, Harvey and Novicevic (2001) have described an eight step process of expatriate selection. This is a structured and detailed process which includes an elaborated evaluation of possible candidates. Each step is presented below:

- Step 1: Identification of potential expatriate pool of candidates.
- Step 2: Assessment of IQ competencies of expatriate candidates.
- Step 3: Determination of learning styles of expatriate candidates.
- Step 4: Determination of thinking styles of potential expatriates candidates.
- Step 5: Determination of assignment task and its environments (internal/external).
- Step 6: Assessment of family characteristics.
- Step 7: Development of repatriation program prior to expatriation.
- Step 8: Selection of expatriate candidates and assignments.

In order to answer research question two the typology developed by Harris and Brewster (1999) will be applied because it is focused on how expatriate selection is actually practiced in MNCs. When it comes to the practice of expatriate selection their theory is widely referred to. Furthermore, the theory developed by Harvey and Novicevic (2001) concerning eight steps of expatriate selection, will be applied to this study due to the strategic nature of it and since it provides deep insight of how expatriate selection can be conducted effectively. Their study is also more recent.

2.4.3 RQ3: Criteria for expatriate selection

When looking at the criteria for expatriate selection previous research has a variety of different approaches. Theories including broad concepts of several selection criteria were needed. Dowling and Welch (2004) provide an overview of the basic factors which need to be considered when selecting expatriates. In terms of individual and situational related aspects there are the following factors:

- Technical ability
- Cross-cultural suitability
- Family requirements
- Country/cultural requirements
- Language
- MNC requirements

According to Harris and Brewster (1999) there are four basic criteria which are looked at when deciding who to select for abroad assignments. These are presented below:

- Technical competence at work/current job performance
- Personality traits/attributes
- Interpersonal skills
- Personal and family situations

Their study is often referred to and well established in the area of expatriate selection criteria and will therefore be applied to this study. Since Dowling and Welch (2004) also present the
aspect of family requirements, it will be combined with the aspect of personal and family situations.

Finally, Harvey and Novicevic (2001) highlight the importance of individual motivation as a success determinant. Choosing expatriates who are eager to go abroad could be valuable for the MNC. A stated previously, their study has a more strategic approach, and it would be interesting to see how this aspect is applied in practice.

In Figure 2.5 the conceptual frame of reference is described visually in order to provide an overview of how the research questions are related to each other and it displays which theories were chosen. The motives for using expatriates influence the selection process, and the selection criteria, as a part of the selection process, are also influenced.

**Figure 2.5: Conceptual frame of reference**
3 Methodology

This chapter presents the methodology for this study, that is, how it was carried out. It explains how the study was conducted in order to answer the research questions. First the purpose of research will be presented followed by the research approach and research strategy. Then the data collection method will be stated followed by an explanation of how the sample was selected and the data analysis method. Finally, a discussion on the quality standards of this thesis will be presented.

3.1 Purpose of research

Stating the purpose of the research helps the reader to understand what the aim of the study is. Saunders, Lewis and Thornhill (2007) state that the overall purpose can be exploratory, descriptive or explanatory. These will be further described below.

When conducting exploratory research the researcher aims to clarify an understanding of a certain problem, and seek new insights by reviewing previous literature and interviewing experts of certain subjects (Saunders et al., 2007). Generally, this kind of research starts with a rather broad perspective which throughout the research process is narrowed down to specific areas of research (ibid).

According to Saunders et al. (2007) the purpose of research can be of a descriptive character, where the researcher wishes to show an accurate nature of certain people, events or situations. When conducting descriptive research a clear picture of the certain investigated phenomena is needed, prior to data collection.

Finally, explanatory research presents the aspect of establishing casual relationships between certain variables. The researcher focuses on situations or problems and attempt to explain the relationships between specific variables (Saunders et al., 2007).

The present study is mainly descriptive due to the descriptive character of the stated research questions. It was decided to look at some specific aspects of the overall research area and further describe them.

3.2 Research approach

A qualitative research approach is usually associated with the analysis of words rather than numbers. It can support the description of certain phenomena, and often from a holistic perspective, where the researcher is concerned with finding patterns of behavior (Denscombe, 2004). According to Miles and Huberman (1994) applying a qualitative research approach involves investigation of how organizations manage day-to-day situations. The focus lies on naturally occurrences, where the researcher wishes to look at the natural setting of how normal events are handled. The benefits of qualitative research include the richness of data, where complexities of phenomena can be revealed. This also emphasizes the importance of interpretation (ibid). Finally, according to Denscombe (2004), when conducting small-scale studies, a qualitative research approach is generally applied.

The aspects of the present study can be compared to the characteristics of a qualitative research approach and one can find the similarities. The present study was mainly of a
descriptive character, where organizational phenomena were investigated. Finding patterns and understanding complex issues was the main focus, and the natural events within the organizations were investigated. Due to a somewhat limited timeframe, the study was rather small-scaled.

### 3.3 Research strategy

According to Yin (1989) there are three issues to consider when deciding which research strategy to use. First, one must look at the type of posed research question, secondly, how much control of events the researcher requires, and thirdly, if the researcher is looking at contemporary events. These conditions are presented in Table 3.1 in connection to the use of case study as research strategy.

<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>Case study</td>
<td>How, Why</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Source: Adapted from Yin, 1989, p. 17.

When research questions are formed as “how” or “why”, control over behavioral events is not needed, and the focus of the research is on contemporary events, Yin (1989) states that case studies are preferable. He continues by describing case studies as a way to investigate contemporary phenomena within a natural setting, where phenomena and context are intertwined.

According to Denscombe (2004) case studies provide in-depth information where the focus lies on the relationships and processes. This strategy allows the researcher to get unique insights and study the details and subtleties of certain phenomena. Denscombe (2004) states that “case studies tend to be ‘holistic’ rather than deal with ‘isolated factors’” (p. 31), where complexities of events, relationships and processes within a case can be discovered more easily. Case studies also provide the opportunity to investigate natural settings of situations and see what is practiced without interference (ibid).

Since the present study was in line with Yin’s (1989) description of a case study, it followed this kind of research strategy. Conducting case studies were appropriate because the focus of the present study was on processes and relationships, where in-depth information on different aspects of these phenomena could provide a holistic review of their many complexities.

For the present study it was decided to look at multiple cases. According to Yin (1989) multiple-case study designs present the advantage of more convincing evidence and therefore build a stronger overall study. Although Yin (1989) states that six to ten case studies are preferable, the present study will include three case studies, due to the fact that handling too much data would have been too time-consuming.

### 3.4 Data collection

According to Yin (1989) there are a few established data collection methods. He continues by stating that when conducting case studies, interviews are one of the most important sources of information. As case studies often concern human affairs, a benefit of interviews can be that
well-informed respondents provide important insight of reported and interpreted information (ibid). Denscombe (2004) notes that interviews provide information from fewer informants and the researcher can therefore get in-depth insight to the investigated topic. In other words, one can gain very detailed information about certain phenomena.

Three semi-structured telephone interviews were conducted in order to collect data for the present study. According to Denscombe (2004) semi-structured interviews allow the interviewees to speak more freely on the raised subject, develop further ideas and elaborate a great deal on their comments. When the interviewees use their own words and speak their minds, it is easier to find complexities of certain issues. The interviewer has a clear list of issues and questions that are to be addressed, but stays flexible when it comes to in what order they are addressed and how much the interviewee wishes to elaborate (ibid). Furthermore the interviews were designed as one-to-one interviews. Denscombe (2004) notes that such interviews make it rather uncomplicated to link certain ideas and statements to certain sources. Such interviews are also easier to control, as the interviewer only has to handle information and take care of one person.

When considering conducting interviews the researcher needs to ensure that there is enough time and resources, both for oneself and the prospective informants (Denscombe, 2004). As the interviews for the present study was designed as telephone interviews, the aspect of cost and time for traveling was limited.

The interviewees were contacted in advance in order to agree on a suitable time for the interview. The interview was supported by an interview guide (see Appendix) and throughout the interviews notes were made in combination with an audio-recorder. Denscombe (2004, p. 176) state that audio-recording “is the standard method of capturing interview data”. However, as a complementing support, the researcher should make notes as well. One must remember that recording only stores data, while interpretation is up to the researcher (ibid).

It was decided to conduct the interviews in Swedish, the researcher and respondents’ mother tongue, in order to limit the risk of inaccurate articulation or language misunderstandings. The interviews were later translated by the researcher with support from a second party.

In addition to the primary data, some secondary data was collected with the purpose of presenting some of the company background, as a part of each of the cases.

3.5 Sample selection

Proper sampling is critical for later analysis of data (Miles & Huberman, 1994). When conducting interviews with a lower number of respondents, it is likely that the sample selection is based on non-probability sampling, where cases are chosen based on the belief that they can provide unique insight to certain areas (Denscombe, 2004). When it comes to selection of multiple cases Miles and Huberman (1994) state that a sampling frame arises based on the stated research questions and the conceptual framework.

Three companies were chosen based on the belief that they could be representative of some Swedish MNCs. SCA, Handelsbanken and Electrolux are all Swedish MNCs who integrate the use of expatriates in their overall business strategy.
For the present study three persons were selected to interview, namely Mattias Ehnhage, international assignments manager at SCA, Magnus Åberg, compensation and benefits manager at Handelsbanken, and finally Angelika Kjelldorff, HR manager group staff at Electrolux. These respondents were selected based on the assumption that they were most suitable within each of the chosen MNCs. It was believed that they would be able to, with depth, answer the questions related to the stated research problem and question.

### 3.6 Data analysis

According to Yin (1989) the goal when analyzing data is to create conclusions and rule out alternative interpretations. Deciding on an overall analysis strategy would support the researcher to complete the analysis successfully. He continues by stating that when conducting case studies, relying on the theoretical propositions which led to the case studies is preferable. By looking at such propositions the researcher gain a better understanding of which data should be highlighted or disregarded (ibid). This was applied for the present study, as the reviewed literature guided the interview guide, and the results from the interviews were compared to previous theory.

Miles and Huberman (1994) describe analysis as a continuous flow of activities, where data reduction, data display, and conclusion drawing and verification are the main aspects to consider. First, the process of selecting, simplifying, transforming, and highlighting data helps to reduce it. Secondly, the data needs to be displayed, in other words organized into a compact form which is easy access. According to Miles and Huberman (1994) this helps the analyzer to get a better overview of what the data actually mean. Finally, one needs to draw conclusions and verify these. Drawing conclusion is done by discovering meanings of patterns or possible configurations. These conclusions then need further verification by considering their validity (ibid). The process of analysis for the present study followed Miles and Huberman’s (1984) recommendation of how to go about analyzing the data.

For the present study within-case analyses first helped to reduce the collected data and later the three cases were compared through a cross-case analysis. Miles and Huberman (1994) explain that the decision to use cross-case analysis is motivated by some factors. It can increase the ability to generalize, deepen the understanding of phenomena, or more easily discover relations between certain issues. This was the case for the present study.

### 3.7 Quality standards

The quality of a research design needs to be discussed, as it is supposed to present certain statements and come to specific conclusions (Yin, 1989). According to Denscombe (2004) the methods used when conducting a research and the drawn conclusions need to be justified. When looking at the quality of a research design Yin (1989) states that the researcher need to address the tests of construct validity, internal validity, external validity, reliability. Testing the construct validity includes developing appropriate measures of the investigated concepts. When it comes to the aspect of internal validity it addresses the establishment of casual relationships and it is an aspect that is only relevant for explanatory studies. The external validity deals with the aspect of how generalizable the findings of the study are. Finally, considering reliability raises the question whether the study can be carried out again, and come to similar findings (ibid).
As a mean to affect the construct validity of the present study an interview guide was
developed, including the specific aspects of the research area that was to be studied (see
Appendix). It was approved by this research’s supervisor, and was reviewed by a third party
before the interviews were conducted. As stated previously the interviews were conducted in
Swedish, and then translated into English by the researcher and a second party. This could be
a factor which influenced the validity of the present study. When conducting interviews one
must consider the possibility of biased results. The interviewer might influence the
interviewee to respond in a certain matter, but by the construct of an interview guide where
specific questions are stated, this influence is limited. In addition, the interviewee may have a
purpose for participating, different than that of the interviewer, and answers may be portrayed
to suit the goal of the interviewee. Furthermore, the construct validity was affected by the fact
that the researcher could contact the interviewees in order to check for accuracy, if further
explanation was needed or additional questions arose.

The external validity of the present study was affected by the use of multiple cases. The
question of whether case studies can create the basis for generalization is addressed by Yin
(1989) as he states that they present unique aspects of an example of a broader category. The
sample for the present study was chosen with the intention to present examples of how
Swedish MNCs view the aspect of selecting expatriates.

Reliability is affected by the consistency of how the research was conducted. When deciding
on the design of the study the reasons were presented and this influences the reliability of the
present study. There was a continuous strive for objectivity, but as stated by Denscombe
(2004) personal influence can not be entirely avoided when conducting case studies. By
designing an interview guide it would be easier for future researchers to repeat the study.
Furthermore, the data from the interviews was translated into English by the support of a
second party, and more accurate and objective data could therefore be presented.
4 Empirical Data

In this chapter the collected data will be presented. The first section concerns the case of SCA, the second is about the case of Handelsbanken, and the final section will present the data from Electrolux. Each section will start by describing the background of the concerned company, followed by the collected data concerning each of the stated research questions.

4.1 Case One: SCA

4.1.1 Company background

SCA is a global consumer goods company within the areas of personal care, tissues, packaging, and forest products. It has reached leading market positions with both consumer and industrial goods. SCA develops, produces and markets its products, and sells most of them under its own brands (such as Libresse, Libero, Tork) and some via retailers. There is a high focus on innovative development, where consumer and customer insight provide the basis of innovation. Additional strengths of SCA are its regional presences with global capability, and effective production.

Its main markets consist of Europe and North America. With operations in some 60 countries it has about 51,000 employees across the world. 75 expatriates are currently positioned abroad, mainly as country or region managers. Most of the expatriates are sent from Europe, and most often sent to USA, Asia and Russia.

Mattias Ehnhage, international assignments manager at SCA was interviewed for the present study.

4.1.2 Motives

SCA has two main motives when deciding to send managers abroad as expatriates. Most common is the aspect of organizational development, through transfer of skill. Secondly, the motive can be to develop individual managers, where abroad assignments can be a part of the managers’ career plans and contribute to personal development. The cost of having expatriates is considered high, and SCA wishes to invest in those who have the goal of staying within the company.

In general SCA does not send managers abroad due to lack of suitable HCN. It can however be seen as a variation of the first motive, where SCA wishes to transfer skill. The knowledge of SCA and how it operates is important for those who are sent abroad. As an example, employees from Europe are often sent to operations abroad which is being developed, where support often is needed.

Sending managers abroad as expatriates with the role of agents of direct control is not that common in the case of SCA. The direct way of controlling is not preferable. Agents of socialization are the most common intended role of expatriates at SCA. Transferring skills involve integrating corporate knowledge and by doing so establishing a way of indirect control. When expatriates are used as agents of socialization a spin-off effect can be the building of networks, but it is not purposely aimed at. The roles of expatriates are not described as boundary spanners or language nodes. The corporate language of SCA is English
and it is expected that all employees know it. Furthermore, SCA believes that employing locals can be necessary sometimes when the objective is to gain entrance to local markets.

4.1.3 Selection process

When the need for an expatriate has been established, the determination of assignment task and its internal/external environment occurs soon after. At SCA the process of selecting expatriates does not differ too much from the process of regular selection of employees. SCA looks at the right mix of technical ability, previous experience and personal attributes when selecting employees, and this is looked over when selecting expatriates as well. When considering expatriate selection the aspect of experience has come to include the aspect of experience of SCA due to the fact that knowledge of the company is important. New employees are seldom sent abroad, and the average age of expatriates is about 45 years. Experience of working abroad can also be preferable. In addition, when considering expatriate candidates, they are tested on their cultural suitability. SCA has hired external psychologists to develop two tests of personality match, as a mean to discover, as early as possible, those who are not suitable for abroad assignments.

The aspect of including families in the selection process also becomes an issue when looking at expatriate candidates. The family needs to fit in with the new culture and be able to live in the new country, otherwise the probability of expatriate failure increases significantly. The expatriate candidates’ spouses take the personality tests. These tests show how receptive the participants are of new cultures and how well the personal values and beliefs match those of the host-country. Also, it needs to be discussed how the family feels about the abroad assignment.

The expatriate selection criteria are not clearly defined, but SCA consider some general criteria depending on the specific situation. Previous experience of similar positions is preferable, as well as ability to live and work in a different culture. The personality tests can determine if there is a very poor match of the person and the culture, and this person will probably not be sent. Furthermore, there are no defined measures of selection.

Expatriate selectors at SCA consist of personnel managers who have the proper education of dealing with selecting employees and expatriates. Specific training of expatriate selection is not provided, but there is however generally a great deal of experience of how it should be handled. SCA tries to direct certain personnel managers to certain regions. By doing so, they get a deeper knowledge of which specific issues need to be addressed in relation to a certain culture or country.

When a need for an expatriate arises at SCA, the vacancies are not openly advertised. Generally the personnel managers, who handle expatriate issues, have information of possible expatriate candidates. SCA has annual performance reviews of employees where possible candidates might be discovered. Personnel managers then discuss the expatriate candidates. If nominations or recommendations arise they are looked at and later it is decided is they are worth emphasizing.

At SCA no formal pool of possible expatriate candidates exists. SCA has very diverse business areas and it would be difficult to handle all critical information about all employees. There is however, due to the annual performance reviews, some understanding of who could be considered for expatriate assignments.
Furthermore, as stated previously there is some assessment of the IQ competences of expatriate candidates. Formal tests look at personality issues, while other aspects are looked at in a more informal manner. At SCA the style of thinking is not determined. However, how expatriates solve problems and their way of working is reviewed. Parts of the personality test concerns how people acts as managers. Learning styles are not determined and it is not focused on.

The issue of repatriation is addressed before departure. It mostly handles practical issues of returning to the country and not aspects of future career options within SCA. Before departure SCA clarifies that there are no certainties of what will happen, career wise, when the expatriate returns. The expectations of the expatriate often differ from that of the company. During abroad assignments it is up to the expatriate to keep in touch with the home-country and part of the responsibility lies with the personnel manager. The final aspect of the selection process is the actual selection of a specific candidate.

### 4.1.4 Selection criteria

As stated previously, SCA believes that technical ability, cross-cultural suitability and family requirements are some of the most important factors to consider when selecting expatriates. The right mix of certain criteria helps to evaluate who would be the most suitable person to send abroad. Several criteria are considered, but many of them are similar to that of regular selection and have already been reviewed. Technical ability is one of these aspects. It has been reviewed earlier but it is still an important criterion to consider when selecting expatriates. Personality attributes and interpersonal skills has also been reviewed previously but is brought up to match the specific abroad assignment.

At SCA cross-cultural suitability is seen as a very important criterion for expatriate selection. As stated previously the tests applied by SCA evaluate the personality in relation to different aspects of culture, and decisions can be partly based on the results from these tests. Family is highly important to consider as SCA believes that families can affect the expatriate failure or success. The county and cultural requirements can also affect the expatriate’s performance, and it is therefore looked at in relation to the expatriate candidate’s personality. Another criterion to consider is the language skills of the expatriate candidate. For some countries this is an important aspect. In China for example, English is an accepted business language, while those who are sent to France need some skills in French. SCA require that some criteria need to be considered in relation to the specific situation.

The current job performance is considered when selecting expatriates, but there is not a great deal of emphasis on the matter. Previous experience is more important as it can be a factor which influences the knowledge of how things work at SCA. Previous international experience can also be beneficial.

### 4.2 Case Two: Handelsbanken

#### 4.2.1 Company background

Handelsbanken is a universal bank which provides services in all banking areas. These include consumer banking, corporate transactions, investment banking and training. A known concept of Handelsbanken is the focus on decentralization. Its branches are the bank where the means of control are focused on the corporate policies, corporate culture and a financial
control system. These branches create a network of banks, where branch managers report
directly to one of Handelsbanken regional banks. The corporate culture is of great importance
for Handelsbanken.

Its main market is Sweden, but during the last couple of years it has grown rapidly to include
Norway, Denmark and Finland, as well as Great Britain as important markets. It has activities
in a total of 22 countries with about 630 branches and about 10,500 employees. Apart from
the operations in the Nordic region and Great Britain, Handelsbanken International operates in
countries such as Austria, China, France, Russia, Germany, India and USA. Handelsbanken
currently employs 120 expatriates. Generally they are sent abroad as operations managers.

Magnus Åberg, compensation and benefits manager at Handelsbanken, was interviewed for
the present study.

4.2.2 Motives
At Handelsbanken there is a clear motive when sending managers abroad as expatriates and
generally it is to support the establishment of the corporate culture, especially when
Scandinavian managers are sent abroad. The establishment of the corporate culture can occur
in a more natural matter if those who have understood and accepted it, and know it well, are
on site to provide support in various operations and processes.

Handelsbanken is of the opinion that suitable HCN are often available in terms of technical
skills. However, the business model of decentralization is more easily implemented by the use
of expatriates who have the proper experience. When sending managers abroad a spin-off
effect can often be a development of these managers, and by acquiring international
experience managers can often hope to reach higher positions within the bank upon return. It
is not always an intended motive as Handelsbanken has a more distinct program which aims
to the development of managers. The main reason for sending managers abroad as expatriates
is connected to the development of the organization, as Handelsbanken wishes to structure
the organization in a distinct matter, by implementing the corporate culture. There is a long-
term commitment of workers and those who go abroad need to believe in the corporate culture
and be able to transfer that belief abroad as well.

Sending managers abroad as expatriates is not aimed at establishing direct control of the
operations. The control is more informal as the aim of expatriates is to share corporate
knowledge, and the intended role of expatriates is therefore often to act as agents of
socialization. It is important for all operations to understand and accept the values and beliefs
of Handelsbanken. Furthermore, expatriates are not used as network builders. Establishing
informal communication networks is not aimed at directly, but it is rather seen as a positive
spin-off effect. HCN are more suitable than expatriates to apply the role of boundary
spanners, as they usually know and understand more of the countries limits and potential.
Finally the corporate language, Swedish, is a part of the corporate culture and well established
at Handelsbanken and therefore the intended role of expatriates is not to be language nodes.

4.2.3 Selection process
The process of expatriate selection starts when a need of a person arises, and what they are
needed as is established. Handelsbanken establishes some basic criteria connected to the
specific situation, and as Handelsbanken usually aims at having expatriates which function as
transmitters of culture they need to be able to function as such. The criteria are not clearly defined but the person needs to be knowledgeable in the specific business area, and have experience of how things are done at Handelsbanken. Furthermore the person needs to feel comfortable with the corporate culture and be able to foster for the coworkers.

Vacancies are advertised internally and those who are interested actively apply. 96% of the managers at Handelsbanken have been selected internally. Traditionally there are interviews with possible candidates. At this stage there are no formal measures of evaluation, but it has been looked at in the initial selection of employees for the company.

At Handelsbanken those who select expatriates are experienced in the area of expatriate selection, but there is no formal training for them. There is also provided support from the personnel department. Those who are involved in the selection discuss and agree on who would be suitable to send as expatriates to the specific position. The selectors involve the recruiting manager, recruiting department and in addition the delivering personnel department are consulted. The decision process of who will be sent as expatriates is not too different from the aspect of deciding on internal selection. When it comes to nominations and recommendations of expatriate candidates they are not overlooked but Handelsbanken tries to attain information about possible candidates in advance. As there is open internal advertising of available vacancies and all those who are interested can apply, the focus is not on personal recommendations but rather merits and overall impression.

Evaluation of employees and expatriate candidates occurs on a regular basis at Handelsbanken. This can support Handelsbanken in getting a better overview of who can be recognized as potential expatriates. It is described as a pool of potential expatriates, but the initiative of applying for international assignments still remains with the person who whishes to go.

Assessment of IQ competences occurs when people are recruited to Handelsbanken, but no additional IQ competence evaluations occur when it comes to expatriate candidates. It can be seen as difficult as there is no predetermined expatriate profile. The learning style of the expatriate candidate is looked at, but not measured or directly determined. The same goes for the thinking style of expatriate candidates, where selectors consider the issue when conducting selection interviews, but do not determine the exact thinking style. Furthermore, the assignment and its task and internal/external environment are determined soon after the need for expatriates has been established.

At Handelsbanken the aspect of family involvement in the selection process is low. They are not to be seen as either a disadvantage nor benefit for the expatriate candidate, when the selectors consider who to select for abroad assignments. It is important for Handelsbanken not to see family or civil status as a criterion. Once it has been decided who to select the family needs will be looked at.

When considering the aspect of repatriation there is a dialogue between the expatriates and their managers of what will happen. Options for the expatriates once they return home, and their expectations for the future is addressed before departure. Then, six months before the expatriates return, they are contacted by the home office, in order to discuss the upcoming situation. The issue of repatriation is highly significant and there is a lot which can be done when addressing it. When assignments are determined and candidates have been reviewed selection occurs based on the decision of whether they match.
4.2.4 Selection criteria

When considering the criteria for expatriate selection there are no predefined formal criteria at Handelsbanken. Different positions abroad demands different criteria. In general, experience within the specific area or experience of abroad assignments is preferable but not always a requirement.

The technical ability of the expatriate candidate is generally a basic criterion for most assignments. At Handelsbanken it is believed that the expatriate needs to be knowledgeable in the specific business area in order to perform well. Furthermore, the cross-cultural suitability of the expatriate candidates is not emphasized but it is considered. It is focused more on the expatriate candidates’ understanding that they are about to meet a new culture. The expatriate candidates need to understand ones own culture, and realize that the culture abroad can differ on several aspects. It is important for expatriates not to think of their own culture as superior.

At Handelsbanken the families of the expatriate candidates are not looked at as a specific criterion. As stated before, having a family should not be a disadvantage or advantage when selecting among expatriate candidates. Furthermore, the country or cultural requirements of the host-country is considered and Handelsbanken tries to match these needs to the expatriate candidate. Specific language skills can sometimes be needed. The needs of the company are also considered when selecting expatriates. Criteria are generally developed to fit to the corporate and assignment requirements.

Handelsbanken considers current job performance as highly significant and those who are selected to be sent as expatriates are generally people who have performed above average. In the case of Handelsbanken there is a performance management process, which can provide documented or spoken statements of how the employees are doing. This is considered very important as Handelsbanken wishes to be confident in the expatriate, and believe that investing the resources connected with the aspect of expatriation will be worth the result.

When looking at the personality of the expatriate candidate there are some important attributes to consider. Handelsbanken mentions that some of the desired attributes are personal responsibility, willingness to develop oneself and the organization, being able to constructively criticize, and be self confident. The interpersonal skills of expatriate candidates are not a spoken criterion, but if the expatriate candidates do not know how to interact with people they will not be selected. Finally, Handelsbanken considers the individuals’ motivation. Selectors review the individuals’ reasons for wanting to go abroad, and since employees actively apply for positions abroad, one can believe that they are somewhat motivated.

4.3 Case Three: Electrolux

4.3.1 Company background

Electrolux is a world leading company when it comes to home appliances and appliances for professional use. The operations include development, production and marketing, where some products are sold under the Electrolux brand and some under its other brands, e.g. Frigidaire, Eureka, Zanussi and Volta. Electrolux’s consumer durables include appliances for kitchen, floor care and laundry. This is Electrolux main area of operations as it account for about 90% of sales. Professional products include appliances for e.g. restaurants and laundries. By cost efficiency, innovative products and a strong global brand, Electrolux will continue to grow.
The main markets consist of Europe and North America, but Electrolux has activities in about 150 countries. Electrolux has about 59,000 employees positioned across 60 countries. Currently, Electrolux has about 200 expatriates out on assignments and they are positioned as managers in different areas.

Angelika Kjelldorff, HR manager group staff at Electrolux, was interviewed for the present study.

4.3.2 Motives

Electrolux wishes to increase and encourage mobility among its employees. Employees are to understand the possibility of finding different career paths, challenging assignments and move among the countries where Electrolux conducts business. There are a few main motives for sending managers abroad as expatriates. If there are no suitable HCN available Electrolux brings the question of filling a position to a broader perspective where it tries to find suitable expatriate candidates. Secondly, if Electrolux has identified key persons or high performers in whom it believes and hopes they will stay within the company, abroad assignments can contribute to their experience and competence. Electrolux might have developed career plans for such employees and international experience (or other additional experience) might be an important part of their future. Finally, the reason to send managers abroad as expatriates can be connected to the development of organizations. Seniors, that is people who have been working for Electrolux for a long time, are often sent abroad with their long experience and great knowledge of Electrolux. They have the knowledge of processes, networks and history of Electrolux, and are sent to places where this information is needed. In cases of new establishments or disorganized established operations, this knowledge is often needed and the seniors can support by transferring it to specific sectors or markets.

The intended role of an expatriate is generally not that of acting as an agent of direct control. Historically, there has been the perception of host-country employees that expatriates are sent by the headquarters as corporate spies. Due to the close relationship Swedish expatriates have with the headquarters it was sometimes perceived as espionage of local operations. If an operational problem arises, the intended role of an expatriate can be to control operations and processes by teaching people to function from a global perspective.

To act as agents of socialization can sometimes be the purpose of an expatriate. Electrolux might send managers abroad when it wants to transfer core values. The corporate culture is important to establish across all operations, with common corporate beliefs and values. When considering the aspect of building networks it often comes naturally when using expatriates. Generally, it is not the main reason and the only intended role, but it can often be a part of the international assignments. This applies mainly to the younger expatriates, who can be sent abroad to build networks from which they can gain knowledge or other benefits in the future.

The role of acting as a boundary spanner is not at all common at Electrolux, but it occurs occasionally. Expatriates are seldom sent to promote the company. Finally, the corporate language at Electrolux is English and sending managers abroad with the intended role of establishing and supporting language related questions is not at all common. Seniors can provide knowledge of how to handle the corporate knowledge but acting as a language node is not a specific intended role.
In addition Electrolux emphasizes the fact the each situation is different, and reasons for sending managers abroad and what their intended role might be, is highly influenced by the specific situation, position and the needs of the company.

4.3.3 Selection process

At Electrolux available vacancies are occasionally advertised internally at its open labor market, where employees can apply to show their interest. This presents an equal chance for all those who wish to apply. Résumés are reviewed in order to find the most suitable person, similar to the selection process of employees. However, expatriate candidates are generally already identified, and this is especially the case when key individuals have been recognized and following the plan to develop these requires certain competences which can be attained through certain assignments. This process involves finding the right persons among those who need to be activated and matching them with the available position. When vacancies are not advertised discussions are held with the expatriate candidate’s superior manager and others who know of the candidate’s qualities. Such discussions are held in order to come to a common agreement of whether the person is suitable or not.

The expatriate selection process is not defined with strict guidelines, where people need to be formally processed in order to qualify as expatriates. Moreover, Electrolux has recently changed their view on expatriates. It used to focus on sending seniors as expatriates, while now it has the focus of opening the possibilities for younger people, often identified as high potentials.

There are no clearly defined selection criteria, but generally Electrolux sees to the expatriate candidate’s ability to transfer core values. It also hopes to concentrate on high potentials, and needs to believe that investing in the expatriate will be worth it. There are no defined measures either, since criteria and the degree of emphasis on them are highly dependent on the current situation and situations differs a great deal. Furthermore, there is no specific training for those who select the expatriates.

In most cases, Electrolux does not advertise the available vacancies connected to abroad assignments. When they do, it is as stated previously, an internal display of open positions. Furthermore, there is no panel of selectors who discuss the candidates. The selectors are brought together for specific expatriate selection where they discuss candidates, together with people who can contribute with important aspects of the expatriate candidate. These are broad discussions based on issues concerning Electrolux’s policies, goals of the assignment as well as its purpose.

Electrolux believes it to be important to look at recommendations and nominations of expatriate candidates. Important aspects of the expatriate candidate might be brought to the selectors’ attention. It can also raise the question of whether Electrolux can afford to lose certain people within a division or whether it can provide future benefits.

A pool of potential expatriate candidates is identified at Electrolux. It looks at the aspect of talent management, where employees are evaluated and so called high potentials are identified. The mobility of these high potentials is then looked at. Electrolux does not determine expatriates candidates’ IQ competencies. Due to the close dialogue between the managers and the host-countries, Electrolux understands the needed competencies of the expatriate. Generally, the managers who send the expatriates has a clear picture of what that
person is like, and know how he or she performs. Learning and thinking styles of expatriate candidates is not determined in a formal matter, but it is briefly looked at as a part of the overall estimation of what the candidate is like. Electrolux focuses a great deal on knowing its employees and the managers who are selecting the expatriate have a good idea of what this person is like.

When a need arises to fill a position the requirements of the specific task is reviewed. When deciding on whom to send abroad, Electrolux considers the nature of the task and see to it that the expatriate candidate has the required capabilities. It should also be noted that the assignment can have the purpose to develop the specific person and it should therefore be somewhat challenging.

There is no assessment of family characteristics. The expatriate candidates can of course discuss the issues concerning expatriation and different solutions of how to handle the assignment are provided to suit the expatriate, the family and the company. It can be decided that the family will join the expatriate later on, or perhaps the expatriate will commute. But when it comes to deciding who to select it is not considered to be of great importance to evaluate the expatriate candidate’s family.

When it comes to developing repatriation programs for the expatriates it is not focused on by Electrolux. However, the expatriates are informed of the fact that they have a home to return to at Electrolux. Their belonging at their home organization is determined which can provide a securing feeling as they leave for abroad assignments. The selection of an expatriate occurs, and they are matched to the assignment.

4.3.4 Selection criteria

Electrolux looks at some basic criteria when considering who to select for abroad assignments. They need to have the knowledge of Electrolux’s core values, and also be able to transfer their expertise as well as collect additional knowledge once they are abroad. Expatriates are often people Electrolux believes in, and considered to be high potentials within the company. Generally, chosen expatriates are people who exceed expectations and get things done within the company. In addition they are often driven people with an ability to see things from a strategic perspective.

At Electrolux the technical ability of expatriate candidates is very important when looking at who to select, and those who are sent abroad are always good at what they do. However, some expatriates with very broad knowledge are sent to attain more specialized expertise, while others with specialized expertise are sent abroad to attain a more broad knowledge.

The cross-cultural suitability of expatriate candidates is reviewed but not looked upon as a critical selection criterion. Moreover, the family is not included when evaluating expatriate candidates. They are only included once the decision has been made and assignments are then structured to involve the family.

The corporate language at Electrolux is English, and all expatriate candidates are required to know it. Additional language skills are not necessary, only in some cases. Knowledge of the host-country’s language is generally not needed. If one continues and looks at MNC requirements in the case of Electrolux, it creates the basis of what is looked at as important
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selection criteria. The managers of the home-country and those of the host-country decide what is required of the expatriate from the corporate point of view.

As stated previously, the current job performance is important to consider, and those who are high performers and exceed expectations are valued high when considering who to select for abroad assignments. Furthermore, the general overview of the personality and interpersonal skills of the expatriate candidate influence the decision on who to select.
5 Data Analysis

This chapter will present the analysis of the empirical data. First, each separate case will be compared to the conceptual framework by conducting within-case analyses, and later the three cases will be compared with each other through a cross-case analysis. By doing so the collected data will be reduced and displayed in order to support the understanding of what it means. This will lead to the drawing of conclusions in the next chapter.

5.1 Within-case analysis

In this section each one of the three cases will be analyzed by comparing the empirical data to the conceptual framework. The analyses will be organized according to concepts related to each of the research questions.

5.1.1 Within-case analysis of SCA

Motives for sending managers abroad as expatriates

Basic reasons

SCA generally does not send managers abroad as expatriates due to the fact that there are no HCN available. This disagrees with the theory developed by Collings et al. (2007) as they state that it is one of the basic reasons why expatriates are used. SCA does however send expatriates when it wishes to develop managers and this agrees with the findings of Collings et al. (2007). At SCA the most common reason for sending managers abroad as expatriates is to develop the organization. This goes in line what Collings et al. (2007) suggest, as they state that it can be one of the main reasons.

In addition SCA notes that the reasons that HCN are not available and organizational development are connected, as usually HCN do not have the corporate knowledge of SCA, which is an important contribution when wanting to develop the organization.

Roles of expatriates

According to Dowling and Welch (2004) there are some intended roles of expatriates. In the case of SCA, sending expatriates as agents of direct control is not that common. The most common intended role of expatriates is agents of socialization where SCA wishes to transfer corporate knowledge and the values and beliefs of SCA. In this case the role of agents of socialization as an intended role of expatriates fit well to the proposed theory. Dowling and Welch (2004) state that the intended role expatriates can be that of network builders, boundary spanners or language nodes, but in the case of SCA these are not intended roles.

Additionally, when it comes to the roles of expatriates SCA is of the belief that the building of networks is sometimes as spin-off effect when sending managers abroad as expatriates.

Expatriate selection process

Typology of selection systems

Harris and Brewster (1999) describe some activities in connection to the expatriate selection process. These will be reviewed and compared to the case of SCA. At SCA there are some general criteria which are considered when selecting expatriates. These are not formally defined and it can therefore be said that there are less defined criteria of selection. There are no defined measures that are used when evaluating expatriate candidates. Moreover, SCA
does not provide specific training for the selectors, but the selectors are usually trained at selecting employees and expatriates when starting to work for SCA.

At SCA available vacancies are not openly advertised and handled internally. There is a kind of panel discussions of the expatriate candidates, but it should be noted that they are informal discussions of some involved personnel managers. It can therefore be said the degree of panel discussions is low. Nominations and recommendations are generally reviewed in the selection processed. At times they can influence the selection. When comparing these aspects to Harris and Brewster’s (1999) theory of open/closed or informal/formal selection processes it can be said that the case of SCA goes in line with most aspect of an informal process of expatriate selection. It can not be defined as an open or closed process based on Harris and Brewster’s (1999) theory, but rather a mix of the two, as some activities implies an open selection process and some indicate a closed selection process.

Eight step process of expatriate selection
Harvey and Novicevic (2001) state that it is necessary to implement a selection process where some significant steps need to be considered in order to manage all aspects of expatriate selection. They suggest that one needs to identify a potential expatriate pool of candidates and at SCA it is not a strict identification. By performing annual performance reviews SCA can attain some understanding of who are potential expatriate candidates.

SCA formally assess some IQ competences of the expatriate candidates through personality test, while some aspects of the IQ competences are only addressed informally. According to Harvey and Novicevic (2001) companies should measure all the aspects through formalized tests. This is not the case when looking at SCA. Furthermore, the learning style of the expatriate candidates is not determined, and therefore it can be stated that it does not match the theory of Harvey and Novicevic (2001) when looking at this issue. The style of thinking is not formally measured at SCA but it is addressed when considering who to select for abroad assignments. The fact that it is addressed agrees with the theory of Harvey and Novicevic (2001) but they also state that it should be formally determined, and that is not the case here.

The next step which is addressed by Harvey and Novicevic (2001) is the determination of assignment task and its environment. This can be applied to the case of SCA where it is an initial procedure which is addressed soon after the need for an expatriate has been established. Assessment of the family characteristics is also a part of the selection process at SCA. It is seen as an important issue and this agrees with Harvey and Novicevic’s (2001) theory.

The issue of repatriation is important to SCA, but repatriation programs are not developed prior to expatriation. Therefore it can be said that the aspect of repatriation does not match the theory developed by Harvey and Novicevic (2001). Another step of Harvey and Novicevic’s (2001) theory concerns the selection of expatriate candidates and assignments. This is the case when looking at the selection process of SCA.

Additionally, it should be noted that the expatriate selection process does not differ a great deal from that of selection of employees.

Criteria for expatriate selection
Factors and criteria to consider
In the case of SCA the technical ability of the expatriate candidates is always reviewed. This goes in line with the statement made by Dowling and Welch (2004) and Harris and Brewster
(1999) as they state that it is the most commonly used criterion. According to Dowling and Welch (2004) the aspect of cross-cultural suitability needs to be addressed. The cross-cultural suitability is highly important when considering who to select at SCA, and it looks at how receptive the expatriate candidates are to a new culture and to what degree their values and beliefs match those of the host-country. A third criterion which is addressed by Dowling and Welch (2004) is that of the family requirements. When comparing this to the case of SCA one can see a match as it is considered to be very important to include the expatriates’ families in the selection process. At SCA these three criteria are the most important to review.

At SCA the country and cultural requirements influence to some extent who to select. Country legislations of course affect the selection, and when seeing it from a cultural perspective it is reviewed in connection to the expatriate candidate’s personality. This goes in line with what the theory developed by Dowling and Welch (2004) suggests. The aspect of language skills includes the critical knowledge of English, the corporate language at SCA. If the expatriate candidates cannot use English they will not be selected. Additional language skills can be necessary for some abroad assignments. This agrees with what Dowling and Welch state (2004) in relation to language skills. Naturally, at SCA the requirements of the MNC are considered, and it can be highly influenced by the specific situation. According to Dowling and Welch (2004) different skills are emphasized for different situations and can be seen as a match with the collected data in the case of SCA.

Furthermore, the current job performance does not have a great influence on the selection of expatriates in the case of SCA. Harris and Brewster (1999) suggest that it is a criterion which influences the decision a great deal, but this is not the case when looking at SCA. Personality traits and interpersonal skills are considered to be important criteria to look at, but mostly in the initial stage where employees are selected to the company. It can then be said that the case of SCA somewhat match the theory of Harris and Brewster (1999) as they suggest that it is important to look at, but also suggest that it is not commonly considered. The final aspect, that of individual motivation, was not used as a selection criterion at SCA. This is not in line with Harvey and Novicevic’s (2001) theory, as they state that looking at the aspect of individual motivation could be beneficial to the MNC.

Additionally, the case of SCA brings attention to the importance of previous experience. It is viewed both in terms of long experience of working at the company as well as previous foreign experience. Finally, SCA wishes to invest in those who it expects will stay with the company in the future.

5.1.2 Within-case analysis of Handelsbanken

Motives for sending managers abroad as expatriates

Basic reasons

In the case of Handelsbanken the reason for sending managers abroad as expatriates is not connected to a lack of suitable HCN. According to Collings et al. (2007) it generally is a basic reason and it can therefore be said that the case of Handelsbanken does not match the theory on this aspect. Also, according to Collings et al. (2007) the development of managers can be described as a basic reason for sending managers abroad as expatriates, but it does not match the case of Handelsbanken as it is more described as a spin-off effect of abroad assignments. Handelsbanken’s main reason for sending managers abroad is connected to the development of the organization. This agrees with the theory developed by Collings et al. (2007) as they state that it can be one of the basic reasons.
Additionally, it should be noted that at Handelsbanken it is believed that the development of managers can be a positive spin-off effect when sending managers abroad. Moreover, at Handelsbanken there is a great deal of focus on the corporate values and beliefs, and it is important that all operations have them integrated through all actions and processes.

**Roles of expatriates**
Expatriates at Handelsbanken are not intended to act as agents of direct control, and there is therefore a mismatch with what Dowling and Welch (2004) suggest concerning sending expatriates to supervise and control. The role as agents of socialization is the most common intended role of Handelsbanken’s expatriates. This goes in line with the suggestion made by Dowling and Welch (2004) that the intended role can be that of agents of socialization, in order to informally control the operations. In the case of Handelsbanken the intended role of expatriates is not to act as network builders, boundary spanners or language nodes. This disagrees with what Dowling and Welch (2004) state, as they describe all of these three roles as commonly intended roles of expatriates.

Furthermore, a positive spin-off effect can be the building of networks once expatriates have been sent on an assignment.

**Expatriate selection process**

*Typology of selection systems*
As stated previously, there are some factors which describe Harris and Brewster’s (1999) theory of open/closed or informal/formal selection processes. These will be looked at and compared to the case of Handelsbanken. When it comes to the expatriate selection process of Handelsbanken, there are no criteria which are clearly defined but generally there are some basic criteria to consider. It can be said that the criteria are less defined. There are no formal measures of evaluation and it can therefore be said that there are no defined measures. These two factors can be related to Harris and Brewster’s (1999) description of an informal selection process.

Furthermore, there is a low degree of training for the expatriate selectors. Although they do not receive formal training, they are often experienced selectors involved in the process. At Handelsbanken available vacancies are openly advertised within the company, and employees apply for the ones they find interesting. This is according to Harris and Brewster (1999) an important aspect of open selection processes. When it comes to the degree of panel discussions, it can be said that it is rather low in the case of Handelsbanken. Finally, the view on nominations or recommendations at Handelsbanken is that it should not be overlooked, but not focused on. By looking at these aspects it is indicated that the selection at Handelsbanken goes in line with what Harris and Brewster (1999) describe as an open/informal selection process.

*Eight step process of expatriate selection*
At Handelsbanken there is an identification of potential expatriate pool of candidates. This goes in line what the theory developed by Harvey and Novicevic (2001), as it states that it is a step included in the selection process. There are no assessments of the expatriate candidates’ IQ competences and this disagrees with what Harvey and Novicevic (2001) suggest to be the proper way of an effective selection process. When it comes to the learning and thinking styles of the expatriates it is aspects that are reviewed but not formally determined. This to disagree with the theory developed by Harvey and Novicevic (2001) as they state that it should be measured by formalized tests and then determined. At Handelsbanken the task of
the assignment and its internal and external environment is determined, and this goes in line with what Harvey and Novicevic (2001) suggest is the right course of action.

The degree of assessment of family characteristics is low at Handelsbanken. This is in contradiction to what Harvey and Novicevic (2001) suggest about the family aspect of expatriate selection. While they believe that it is highly important to consider, Handelsbanken does not want to see to the family as a factor which influence the decision of who to select. Furthermore there is not a development of repatriation program prior to expatriation in the case of Handelsbanken. Harvey and Novicevic (2001) suggest that it should be considered in the selection process in order to understand how complicated the repatriation can become, and this is not an aspect of the selection process that is reviewed by Handelsbanken. The step concerning selection of expatriate candidates and the assignments is an important part of the selection process. The case of Handelsbanken and the theory developed by Harvey and Novicevic (2001) agrees on this point.

In addition, it should be noted that some aspects of the reviewed theories have already been considered in the initial employee selection process. The expatriate selection process at Handelsbanken is not too different from the internal selection.

**Criteria for expatriate selection**

*Factors and criteria to consider*

At Handelsbanken the technical ability is viewed as a basic criterion when considering who to select for abroad assignments. This goes in line with what Dowling and Welch (2004) and Harris and Brewster (1999) state, that it is the most commonly used criterion. The aspect of cross-cultural suitability is only somewhat considered, and according to Dowling and Welch (2004) it is an important criterion to consider. It can therefore be said that Handelsbanken is not in line with the developed theory, when it comes to this aspect. Another criterion which shows a mismatch between what Handelsbanken believes, and what theory suggests is the aspect of family related issues in connection to selection criteria. While Handelsbanken believes it to be important not to look at the family as a criterion for expatriate selection, Dowling and Welch (2004) state that it must be considered in order to limit the possibilities of expatriate failure. Handelsbanken does not want to differentiate expatriates due to family related issues, as it is believed that family should not be of an advantage or disadvantage for the expatriate candidates.

Handelsbanken considers the country and cultural requirements in relation to the expatriate candidate. This goes in line with Dowling and Welch’s (2004) theory as they believe it to be a factor which needs to be considered. Specific language skills are sometimes needed and are in those cases highly important. It is also a factor which needs to be considered according to Dowling and Welch (2004) and it can be said that this data and this theory, match. Furthermore, the company requirements generally create the basis of what criteria should be looked at. This aspect of factors to consider when selecting expatriates math the theory developed by Dowling and Welch (2004). Another aspect to consider is the current job performance, and this case matches what Harris and Brewster (1999) suggest. Handelsbanken emphasizes this aspect and Harris and Brewster (1999) state that it is a common selection criterion.

When it comes to the personality attributes of the expatriate candidates there are some important attributes which Handelsbanken considers. Harris and Brewster (1999) believe this to be an important criteria and it can be said that the case of Handelsbanken matches the
theory when it comes to this aspect. Interpersonal skills of the expatriate candidates is somewhat considered. When comparing this to the theory of Harris and Brewster (1999) there are similarities, but Harris and Brewster (1999) emphasizes it more. At Handelsbanken the expatriate candidates’ motivation of going abroad is somewhat considered, but since the possible candidates apply actively for abroad assignments, it can also be assumed that they all have some basic motivation. Harvey and Novicevic (2001) emphasize that expatriates who are eager to go abroad are more likely to succeed. It can be said that the case somewhat matches the theory when it comes to the aspect of individual motivation.

Additionally, the case of Handelsbanken presents the emphasis on experience of expatriate candidates. Experience within the specific area of operations, or experience of international assignments can be beneficial for the expatriate candidate. Finally, Handelsbanken wishes to be confident in the person who is sent abroad and it needs to believe that they are worth the effort.

### 5.1.3 Within-case analysis of Electrolux

**Motives for sending managers abroad as expatriates**

**Basic reasons**

At Electrolux one can find that there are three reasons why managers are sent as expatriates. First, if there is the matter of no suitable HCN, Electrolux broadens the perspective and search for possible expatriates. Secondly, Electrolux can wish to develop managers, as a part of their career-path. Finally, the reason can be to develop the organization. According to Collings et al. (2007) these three are the most common reasons for sending expatriates. They also suggest that there are often multiple reasons for sending managers as expatriates. When considering the case of Electrolux and compare it to the theory of Collings et al. (2007) it can be said that there is a very good match.

In the case of Electrolux it should also be noted that there is a goal of increasing and encouraging employee mobility. Employees are to understand that there is the possibility to experience Electrolux internationally.

**Roles of expatriates**

Acting as agents of direct control is generally not an intended role of Electrolux’s expatriates. It is seldom an intended role and this does not go in line with what Dowling and Welch (2004) believe as they state that expatriates are often intended to directly observe and control local operations. Another intended role of expatriates can, according to Dowling and Welch (2004), be that of agents of socialization, where expatriates are expected to incorporate corporate values and beliefs in order to establish some informal control. The case of Electrolux agrees with this, as it can be described as an intended role of Electrolux’s expatriates. Moreover, Dowling and Welch (2004) describe that the intended role of expatriates can be to build networks. However, when comparing this to the case of Electrolux, it is not often that it is the only intended role. It can therefore be said to be a somewhat match.

In the case of Electrolux one can see that the intended role of expatriates is not that of acting as a boundary spanner, and neither that of acting as a language node. It can sometimes be part of an assignment but it seldom occurs. This disagrees with Dowling and Welch (2004) belief that it is a common role of expatriates.
In addition, when considering the aspect of using expatriates as agents of control, it should be noted that in the case of Electrolux, historically, expatriates have sometimes been perceived to be sent as corporate spies. Furthermore, if looking at the roles of expatriates, Electrolux can sometimes have more than one intended role of an expatriate. Parts of certain assignments can be to build networks, while other parts can be to establish informal control. Finally, Electrolux emphasize that the use of expatriates is influenced highly be the situation and specific circumstances.

**Expatriate selection process**

*Typology of selection systems*

When looking at the case of Electrolux, one can see that it does not have clearly defined selection criteria but there is however some basic ideas of what need to be reviewed and it can therefore be said that the criteria are less defined. Electrolux does not have defined measures of evaluation and it does not provide training for expatriate selectors. When comparing these three aspects of selection to the theory developed by Harris and Brewster (1999) one can not find similarities to a formal selection process, but rather an informal type of selection.

At Electrolux vacancies are sometimes advertised internally, but most of the times it is a matter of having pre-identified expatriates candidates. This indicates, when comparing it to Harris and Brewster’s (1999) theory, that it is generally a closed selection process, but an open selection is sometimes applied. Furthermore, expatriate candidates are discussed by some involved managers, and Electrolux does not describe it as panel discussions since the discussions are not in-depth, and different managers handle different candidates. Finally, nominations and recommendations are reviewed as they might bring up important aspects of the expatriate candidates. It can be said that these two aspects of the expatriate selection goes in line with what Harris and Brewster (1999) describe as informal and somewhat closed selection. When taking all these aspects into consideration, the selection process of Electrolux generally goes somewhat in line with the informal/closed selection process. The theory does not match entirely, as some aspects of this case indicate an open/informal selection, and some indicate a closed/informal selection.

In addition, Electrolux emphasizes the fact that selection of expatriates differ a great deal in relation to the situation.

*Eight step process of expatriate selection*

There is an identified potential expatriate pool of candidates at Electrolux. This goes in line with the theory developed by Harvey and Novicevic (2001) as they state that it is a step in the expatriate selection process. Another step they describe is that of determining the IQ competencies of the expatriate candidates. However this can not be applied to the case of Electrolux. The learning style and thinking style of expatriate candidates is not formally determined when evaluating the expatriate candidates. This does not go in line with the theory developed by Harvey and Novicevic (2001) as they state that it is steps of successfully selecting expatriates.

Determination of assignment task and its internal and external environment occurs shortly after the need of an expatriate has arisen. It is a step which is described in the theory developed by Harvey and Novicevic (2001) and the case of Electrolux shows a match to the theory, when it comes to this aspect. When looking at the aspect of family the theory of Harvey and Novicevic (2001) shows that one need to evaluate family characteristics in order
to find ways of limiting family related problems. The case of Electrolux does not go in line with this theory, as it does not find assessment of family characteristics to be of importance.

At Electrolux there is no development of repatriation programs prior to departure, which does not match the theory developed by Harris and Novicevic (2001) as they state that a basic plan of repatriation helps to consider how complicated the repatriation will be. Finally, the selection of expatriate candidates and assignments occur as the final step of the expatriate selection process. This goes in line with the theory developed by Harris and Novicevic (2001).

It should be noted that there is overall estimations of the expatriate candidates and Electrolux focuses on knowing its employees. The case also showed that sometimes when assignments were matched with expatriate candidates, the goal of developing managers could mean that the task needed to be somewhat challenging.

Criteria for expatriate selection

Factors and criteria to consider

The technical ability of expatriate candidates is very important, in the case of Electrolux. This goes in line with the theory of Dowling and Welch (2004) and Harris and Brewster (1999). Electrolux does not focus a great deal on the cross-cultural suitability of expatriate candidates, and when comparing it to the theory of Dowling and Welch (2004) it can be said that there is not a match, since the theory states that it is important to look at when considering international issues. This is also the case when looking at how Electrolux does not see the aspect of family as a critical criterion, while Dowling and Welch (2004) believe it to be an important criterion to consider in order to limit family related problems of expatriation.

Moreover, Electrolux did not provide data concerning the aspect of country/cultural requirements. When looking at the aspect of language, the corporate language at Electrolux is English and it is required that expatriate candidates have English language skills. Additional language skills are not always needed. This goes in line with what Dowling and Welch (20004) state concerning language skills. MNC requirements create the basis for deciding what selection criteria that needs to be addressed. This agrees with the theory of Dowling and Welch (2004).

Current job performance is an important aspect of Electrolux’s selection criteria. This goes in line with the theory of Harris and Brewster (1999) as they state that it is a common selection criterion. Furthermore, there is the aspect of personality traits and the interpersonal skills of the expatriate candidates. At Electrolux these are viewed as selection criteria but only as it create an overall good impression of the expatriate candidates. This somewhat agrees with the theory of Harris and Brewster (1999) but the theory puts greater emphasis on it than Electrolux does. Moreover, Electrolux did not provide data concerning the aspect of individual motivation.

It should be noted that the case of Electrolux shows how it considers the expatriate candidates’ ability to transfer expertise and also the ability to collect new knowledge. Generally, expatriate at Electrolux are people who exceed expectations, and are seen as high potentials. Also the general expatriate is driven and have an ability to see thing from a strategic perspective. As stated previously, when Electrolux consider expatriate candidates it focuses on a general overview of several different selection criteria depending on the
situation. Finally, it should be noted that the case of Electrolux shows that it is important that it believes that the expatriate will be worth the effort.

5.2 Cross-case analysis

In this section the data of the three cases will be compared with each other through a cross-case analysis. It will first be shown graphically and then further analyzed in narrative form. The analysis will be organized by first looking at motives for sending managers abroad, then expatriate selection processes and finally criteria for expatriate selection.

5.2.1 Motives for sending managers abroad as expatriates

In Table 5.1 a cross-case analysis concerning the motives for sending managers abroad as expatriates, is presented. It provides an overview of the relations between the three cases.

<table>
<thead>
<tr>
<th>Motives for sending managers abroad as expatriates</th>
<th>SCA</th>
<th>Handelsbanken</th>
<th>Electrolux</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic reasons</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HCN are not available</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Developing managers</td>
<td>Yes</td>
<td>Partly</td>
<td>Yes</td>
</tr>
<tr>
<td>Developing the organization</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Roles of expatriates</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Agent of direct control</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Agent of socialization</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Network builder</td>
<td>No</td>
<td>No</td>
<td>Partly</td>
</tr>
<tr>
<td>Boundary spanner</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Language node</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

The table above shows the aspects of the theories developed by Collings et al. (2007), and those of Dowling and Welch (2004) in relation to the responses of the three cases. First, the basic reasons were reviewed and “yes” or “no” refers to whether a certain aspect is seen as a reason. Secondly, the roles of expatriates in each of the cases are considered. The answers “yes” or “no” refers to whether the presented role can be described as role of expatriates in the three cases.

Basic reasons

Generally, neither SCA nor Handelsbanken see that the lack of suitable HCN is a reason why they send managers abroad as expatriates. Out of the three cases, only Electrolux saw it as a reason and it can therefore be said that there is weak support of the theory concerning using expatriates when there are no suitable HCN available. Both SCA and Electrolux send managers abroad with the objective of developing managers. Handelsbanken on the other hand, does not see it as a reason for sending managers abroad, but rather a spin-off effect. The statement that development of managers is a common reason for sending managers abroad, can be said to be supported by the cases, although it should be noted that it is not a full support. Developing the organization can also be a reason for why companies send managers abroad, and it is described as a reason in all of the cases.
Roles of expatriates
Expatriates are not used as agents of direct control in any of the cases. It can be said that the focus lies on a more informal way of control, as all of the companies stated that agents of socialization is a common intended role of expatriates. Sending managers abroad as network builders is not at all common in any of the cases, but it should be noted that Electrolux sometimes see it as an intended role, but only in combination with other roles. Applying the role of boundary spanners to expatriates does not occur commonly in any of the cases. The cases also disagree with the statement that expatriates have the intended role of language nodes. SCA and Electrolux have English as their corporate language, and Handelsbanken applies Swedish, but still neither of the companies sees the aspect of implementing language standards as task for expatriates.

5.2.2 Expatriate selection process
The table below displays a cross-case analysis, concerning the expatriate selection process in the three studied cases. It provides an overview of how the three cases can be compared.

Table 5.2: Cross-case analysis of expatriate selection process

<table>
<thead>
<tr>
<th>Typology of selection systems</th>
<th>SCA</th>
<th>Handelsbanken</th>
<th>Electrolux</th>
</tr>
</thead>
<tbody>
<tr>
<td>Degree of defined criteria</td>
<td>Low</td>
<td>Low</td>
<td>Low</td>
</tr>
<tr>
<td>Degree of defined measures</td>
<td>Low</td>
<td>Low</td>
<td>Low</td>
</tr>
<tr>
<td>Degree of training for selectors</td>
<td>Low, but personnel department involved</td>
<td>Low, but personnel department involved</td>
<td>Low</td>
</tr>
<tr>
<td>Degree of advertising vacancies</td>
<td>Very low</td>
<td>High (internally)</td>
<td>Low</td>
</tr>
<tr>
<td>Degree of panel discussions</td>
<td>Low</td>
<td>Low</td>
<td>Low</td>
</tr>
<tr>
<td>View on nominations/recommendations</td>
<td>Must be reviewed</td>
<td>Taken into consideration but not focused on</td>
<td>Must be reviewed</td>
</tr>
<tr>
<td>Open/formal</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Closed/formal</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Open/informal</td>
<td>Yes, to some extent</td>
<td>Yes</td>
<td>Yes, to some extent</td>
</tr>
<tr>
<td>Closed/informal</td>
<td>Yes, to some extent</td>
<td>No</td>
<td>Yes, to some extent</td>
</tr>
</tbody>
</table>
Table 5.3: Continued

<table>
<thead>
<tr>
<th>Eight step selection process</th>
<th>l. Identify potential expatriate pool of candidates</th>
<th>Rather low degree of</th>
<th>High degree of</th>
<th>Rather low degree of</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Assessment of IQ competencies</td>
<td>Some</td>
<td>None</td>
<td>None</td>
<td></td>
</tr>
<tr>
<td>3. Determination of learning style</td>
<td>None</td>
<td>Some</td>
<td>Some</td>
<td></td>
</tr>
<tr>
<td>4. Determination of thinking style</td>
<td>Some</td>
<td>Some</td>
<td>Some</td>
<td></td>
</tr>
<tr>
<td>5. Determination of assignment task and its environment (internal/external)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>6. Assessment of family characteristics</td>
<td>Yes</td>
<td>None</td>
<td>None</td>
<td></td>
</tr>
<tr>
<td>7. Development of repatriation program prior to expatriation</td>
<td>None</td>
<td>None</td>
<td>None</td>
<td></td>
</tr>
<tr>
<td>8. Selection of expatriate candidates and assignments</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
</tr>
</tbody>
</table>

Table 5.2 presents the aspects of Harris and Brewster’s (1999) typology of selection systems, as well as the theory of the eight step expatriate selection process developed by Harvey and Novicevic (2004). It further displays how the theory can be related to the respondents’ answers, in a comprised matter.

**Typology of selection systems**

The three cases of the present study present similar data when it comes to the degree of defined criteria. There is a low level of defined criteria, where the cases present that there are some basic criteria to consider but they can also depend on the situation. Furthermore, there is a low degree of defined measures in all of the cases. Training of selectors is not provided in any of the cases, but in the cases of SCA and Handelsbanken, personnel departments are involved in the selection process. This indicates experience of selecting employees and to some extent expatriates. When it comes to advertising vacancies, SCA have a very low degree of advertising, as managers are usually aware of some suitable expatriate candidates. Handelsbanken, on the other hand, advertise all the available vacancies and review résumés of those who apply. When comparing this to the case of Electrolux, there is a low degree of advertising vacancies where it only occurs occasionally. Generally, managers are aware of who could be identified as expatriate candidates. If looking at the aspect of panel discussions, the cases present similar data. There is a low degree of panel discussions in all of the cases. Finally, when looking at how the companies view nominations and recommendations one can see that SCA and Electrolux seem to have the same point of view. They believe that nominations and recommendations are important to review, as it can provide crucial information of expatriate candidates. However, Handelsbanken is of a different view.
Nominations and recommendations should not be focused on, since the company hope to gain an understanding of the expatriate candidates without great influence from others.

When combining the aspects of the typology of selection systems one can see a clear pattern of informal selection procedures, mainly since there are no clearly defined criteria or measures and the training for selectors is very limited. It can therefore be said that none of the companies apply an open/formal or closed/formal selection process. When looking at the open/informal selection process Handelsbanken goes in line with this. SCA and Electrolux have similar answers and these somewhat match the open/informal selection process. They do however, somewhat match the closed/informal selection process as well. That is not the case when looking at Handelsbanken.

Eight step process of expatriate selection
When looking at the steps of a selection process among the three cases, one can find some matching aspects and others that do not match. Firstly, both SCA and Electrolux do not clearly identify a potential expatriate pool of candidates. Handelsbanken do not go in line with the other two cases. When looking at whether the companies assess the IQ competencies there is a closer relation between the cases. Neither Handelsbanken nor Electrolux look at the aspect of such competencies, and SCA only looks at small parts of it.

SCA does not look at the learning style of the expatriate candidates. Handelsbanken and Electrolux only look at it briefly, without formal tests. The same goes for the determining of the thinking styles of expatriate candidates, where all the cases look at it briefly but do not test it formally.

Determination of assignment task and its environment is an important part of the selection process in all the cases. Moreover, the assessment of family needs to be addressed. SCA look at this aspect and believe it to be an important part of the selection process. If one looks at Handelsbanken and Electrolux, that is not the case. There is a better match among the cases when looking at the two last aspects of the eight step process of selection. There is no development of repatriation programs in any of the cases, which strongly disagrees with the proposed theory. The final aspect, selecting expatriate candidates and assignments, is a part of the companies’ selection process.

5.2.3 Criteria for expatriate selection
Table 5.3 displays a cross-case analysis of some criteria for expatriate selection. The three cases of the present study are presented in the table, in order to provide an overview of possible patterns.
Table 5.4: Cross-case analysis of criteria for expatriate selection

<table>
<thead>
<tr>
<th>Factors and criteria to consider</th>
<th>SCA</th>
<th>Handelsbanken</th>
<th>Electrolux</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical ability</td>
<td>Highly important</td>
<td>Highly important</td>
<td>Highly important</td>
</tr>
<tr>
<td>Cross-cultural suitability</td>
<td>Highly important</td>
<td>Some</td>
<td>No</td>
</tr>
<tr>
<td>Family requirements</td>
<td>Highly important</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Country/cultural requirements</td>
<td>Some</td>
<td>Some</td>
<td>No data</td>
</tr>
<tr>
<td>Language</td>
<td>English, critical.</td>
<td>Depends on the situation</td>
<td>English, critical.</td>
</tr>
<tr>
<td>MNC requirements</td>
<td>Important</td>
<td>Important</td>
<td>Important</td>
</tr>
<tr>
<td>Current job performance</td>
<td>No</td>
<td>Highly important</td>
<td>Highly important</td>
</tr>
<tr>
<td>Personality traits/attributes</td>
<td>Some</td>
<td>Highly important</td>
<td>Some</td>
</tr>
<tr>
<td>Interpersonal skills</td>
<td>Some</td>
<td>Some</td>
<td>Some</td>
</tr>
<tr>
<td>Individual motivation</td>
<td>No</td>
<td>Some</td>
<td>No data</td>
</tr>
</tbody>
</table>

The table above presents aspects of theories developed by Dowling and Welch (2004), Harris and Brewster (1999), and Harvey and Novicevic (2001). Moreover, it shows how the three cases of the present study can be compared to each other.

Factors and criteria to consider

It has been stated that technical ability is commonly looked at when companies select expatriates. That is the case in the present study, where the three companies proposed that it is highly important. However, the companies do not agree when looking at the aspect of cross-cultural suitability of the expatriate candidates. SCA believes it to be important to look at. Handelsbanken looks at it to a small degree, while Electrolux does not consider it important. It can therefore be said that there are diverse opinions of whether cross-cultural suitability is important.

SCA looks at the expatriates’ families when considering who to select for abroad assignments. The cases of Handelsbanken and Electrolux do not agree with this statement and it might therefore be said that the study present limited support of the statement that families need to be considered. The country/cultural requirements somewhat influence who to select for abroad assignments, but there is not enough data concerning this aspect. In all of the three cases, the aspect of using language as a selection criterion is highly dependent on the situation. There is a match of all the cases when considering the aspect of MNC requirements. The companies agree and believe that the need of the company support the decisions of criteria that are important to look at.

Looking at current job performance of the expatriate candidates is important in the cases of Handelsbanken and Electrolux. SCA is not of that opinion, but still the provided data from the three cases support a great deal, the statement that it is commonly looked at as a selection
criterion. The statement that personality traits/attributes are commonly looked at is partly supported by the three cases. SCA and Electrolux look at it to some extent, while Handelsbanken think of it as a highly important selection criterion. The interpersonal skills are often considered to some extent in all the cases as it has been suggested that if the expatriate candidate is not good with people they will not be selected. Finally, if looking at the motivation of the individual the data is not sufficient enough to make any statements, but the case of SCA and Handelsbanken does not present it as an important selection criterion.
6 Findings, Conclusions and Implications

In this chapter the research questions will be answered in order to fulfill the overall research purpose. Based on the analysis, findings and conclusions will be presented, followed by implications for theory, practitioners and future research.

6.1 RQ1: How can the MNCs’ motives for sending managers abroad as expatriates be described?

The reason for sending managers abroad as expatriates can not be said to be connected to the lack of suitable HCN. Instead it was found that MNCs generally send managers abroad as expatriates because there is an objective to develop the organizations abroad. By sending experienced managers the MNC can easier implement corporate values and beliefs in abroad operations, as well as provide knowledge of how processes and additional procedures should be handled within the MNC.

It was also found that the role of an expatriate is generally to act as an agent of socialization. Generally, the objective is to implement informal control, by providing knowledge of how things should be handled within the MNC. By acting as one who shares knowledge of the MNCs’ values and beliefs, the expatriate can support the development of the organization. In other words, a connection can be found between the motive to develop the organization and the purpose of sending the expatriates as agents of socialization.

Another motive can be to develop individual managers. Abroad assignments can provide individual managers with proper experience of managing in international settings and this can provide future benefits for the MNC. Investing in the expatriates for future advantages is common among the MNCs.

Sending managers abroad with the intended role of acting as network builders is not common among MNCs, but it can also be noted that it can be seen as a part of an abroad assignment. It can be a part the intended role, or rather seen as a positive spin-off effect. Building networks could be seen as a positive product of sending managers abroad, but MNCs do not limit the expatriate’s role to act as such.

The role of expatriates can not be described to act as boundary spanners. Collecting market information, representing the firm or influencing important agents of a specific market is not tasks of expatriates. This could be explained by considering HCN as more suitable for such tasks, and they would then report back to headquarters.

Applying the role of language nodes to expatriates is not at all common. As stated previously, it is not a role that is restricted to expatriates, as HCN can be appropriate for supporting the establishment of a standardized way of communicating. Due to the global character of MNCs, languages influence operations on several aspects and there is an ongoing strive for finding a common base of communication.

Based on the analysis and the findings, the following conclusions are drawn:

- Swedish MNCs’ motive to send managers abroad as expatriates can not be said to be connected to the lack of suitable HCN.
- Swedish MNCs most commonly send managers abroad with the motive to develop the organization.
- Expatriates are most often sent abroad to act as agents of socialization.
- Swedish MNCs send managers abroad as expatriates with the motive to develop them, if they believe that it will provide future benefits.
- Establishing the corporate knowledge in abroad operations is of strategic importance for Swedish MNCs.

6.2 RQ2: How can the process of expatriate selection in MNCs be described?

Adopting a formal approach to expatriate selection can be described as somewhat difficult, as there are generally great differences between the abroad assignments. It was found that the expatriate selection process of MNCs is not described as formal, and therefore it can not be described as either open/formal or closed/formal.

Specific situations help define how the selection can be described. It was found that an informal expatriate selection is generally applied, where clearly defined characteristics of the selection process are hard to find. The degree of defined criteria, measures, training for selectors and panel discussions is low among MNCs.

Considering the aspect of whether the selection is open or closed, it can be described as a mix of the two. When there is no advertising of vacancies one can be quick to believe that the selection process is closed, but when reviewing the theory of closed selection processes, there are other important aspects. Previous theory states that nominations are what influence who the expatriate candidates are, but such is not the case for the present study. By evaluating employees annually, the MNC can find some expatriate candidates which seem interesting to review. When considering certain expatriates they are aware of the fact that they are being evaluated and this is not a characteristic of a closed expatriate selection. Another important part of the expatriate selection process is the requirements of the MNCs in the specific situation. This also indicates that it is not a closed selection process where usually the selectors’ individual preferences determine what to look at when considering expatriate candidates. It was found that MNCs’ expatriate selection process can not be described as neither open/informal, nor closed/informal, but rather a mix of the two. The process can in some cases be described as somewhat open/informal, but in some cases it is a more closed process.

It was found that the expatriate selection process can not be described as a process of defined steps. Generally, expatriate candidates are considered by looking at some basic criteria of selection, including learning and thinking style. These aspects are briefly looked at in combination with other criteria, based on the situation. MNCs determine the assignment tasks and its internal and external environment. It was found that most commonly the family does not influence the expatriate selection, but they are later considered as a part of the actual expatriation.

The study presents the fact that repatriation programs are not developed prior to departure. It was found that the MNCs could consider developing more elaborate repatriation policies but not as a part of the selection process. Then, when looking at the selection of expatriate candidates and the proposed assignment, it is only natural that MNCs try to match these aspects. It is however not as formalized process of selection. The proposed theory states that
selecting expatriates by a formalized process can support the determination of whether the selection process needs to be further developed, and it can also support the determination of characteristics of a successful expatriate. It was found that the MNCs selection processes are influenced by the situation, which makes the process inconsistent.

Finally, it was found that often the expatriate selection process is not too different from the regular employee selection. Some additional aspects can be added, but the overall structure of expatriate selection is similar to that of the employee selection. Also, some aspects of the expatriate selection have already been reviewed during the initial employee selection. This could indicate that expatriates are not viewed too differently from regular employees, and by that the MNC loses the international aspect of business abroad.

Based on the analysis and the findings, the following conclusions are drawn:

- Swedish MNCs apply informal expatriate selection processes.
- At Swedish MNCs the expatriate selection processes are designed to fit the specific situation.
- At Swedish MNCs the use of formalized tests of expatriate candidates is very low.
- Swedish MNCs do not develop repatriation programs prior to expatriation, as it is dealt with later after expatriates have been chosen.

6.3 RQ3: How can the criteria used by MNCs for expatriate selection be described?

It was found that MNCs believe that the technical ability is an important criterion for expatriate selection. It provides the expatriates with the basic understanding of what is included in the tasks and they believe that they can do it. When considering the theories of selection criteria it has long been one of the criteria which have been focused on by MNCs. This continues to be the case.

MNCs are of different opinions when looking at the aspect of cross-cultural suitability as a selection criterion. It was found that it can be a very important selection criterion in some cases, while it can be an insignificant aspect of expatriate selection in other cases. This can either indicate that the MNCs are global companies to the extent that a country’s culture does not affect the expatriate, or it can be a sign which points to the lack of an international focus of the MNCs.

When looking at the aspect of family it was found that it is generally not considered to be a criterion for expatriate selection. As the families of expatriates have been considered to be a major factor of expatriates failure or success, it should be considered. However, it can be believed that aspects of an expatriate candidate’s private life should not effect the decision of who to choose for a certain assignment. It was found that in one of the cases the aspects of the expatriate’s family was highly important, and influenced the choice a great deal.

Country/cultural requirements influence the decision to some extent. Legal aspects must be considered but it is generally an issue that is considered in connection to the decision to send an expatriate to a certain assignment. The aspect of language skills is somewhat connected to the aspect of the country/cultural requirements. It was found that the MNCs’ view on the importance of language skills were affected by the situation and location of assignment, where some countries are more demanding when it comes to the language requirements.
Language skills are always important to consider where the skills of the corporate language is critical while additional language skills does not influence the selection unless it is connected to the requirement of the country.

Furthermore, it was found that the MNC requirements influence which criteria to consider. It creates the basis of what is seen as important abilities of the expatriate. However, they can not be standardized, as the specific situations influence the criteria which need to be considered.

The current job performance was found to be an important criterion to consider. It gives an overview of what the expatriate candidate’s is capable of. Investing in high performers can be beneficial for MNCs. However, one needs to remember that international assignments can be a different and unfamiliar challenge, where the candidate might become more insecure.

It was found that personality traits/attributes are seen as a criterion. The focus on it on the other hand, differs to some extent. While some find it very important, others briefly look at it in order to get an overall impression of what the person is like. Interpersonal skills are considered but there is not a great focus on it.

Finally, one additional criterion occurred. The MNCs view the experience of the expatriate candidate as highly important. This is especially important if the purpose of the expatriate is to develop the organization, where long experience of the MNC is needed in order to have the appropriate corporate knowledge.

Based on the analysis and the findings, the following conclusions are drawn:

- Technical ability is the most important criterion for expatriate selection.
- Previous experience (either within the company or previous abroad assignments) is seen as a criterion for expatriate selection.
- At Swedish MNCs specific situations determine which criteria are important to review for expatriate selection.
- Swedish MNCs generally have rather different views of what criteria are important to consider.
- Swedish MNCs need to believe in the potential of the expatriate, and believe the expatriate will be worth the effort.

### 6.4 Implications for practitioners

This section presents recommendations and suggestions for practitioners and managers in connection to the aspect of selecting expatriates. It is based on the empirical data, data analysis, and the findings and conclusions.

When considering the roles of expatriates it can be noted that it does not have to be one single intended role. The expatriate can sometimes act as a combination of different roles. As an example, if they are sent as network builders, they can at the same time be able to further understand the local markets, and find benefits by expanding boundaries through their contacts.

Informal ways of expatriate selection are more easily adapted to the specific situations that occur. Formalized processes can however provide a more structured way of selecting expatriates, where the chance of accidentally overlook a certain important aspect of expatriate
selection. While closed processes or expatriate selection can more quickly find a suitable expatriate candidate, employees should get an equal chance to apply and be evaluated. By evaluating all those who are interested the MNC will more probably find the one who is most suitable for the assignment. This will also show the MNC how candidates are committed to the company and/or the assignment. It can also be noted that by training expatriate selectors the MNC will have a better understanding of what crucial factors need to be considered from the international point of view.

Implementing a step-by-step process can support the MNCs ability to identify what makes a successful expatriate. By constantly evaluating the selection process it can be improved on a continuous basis. If one does not develop processes, identified mistakes can be unconsciously repeated. Moreover, an identified process of expatriate selection influences the strategic thinking of who to select for abroad assignments.

In some cases, when expatriates are sent abroad with the purpose of personal development the MNCs need to secure the expatriate’s return. A difficult or disturbing repatriation may affect the expatriate’s willingness to commit to the company. Developing a repatriation program prior to expatriation gives the MNC an idea of what needs to be considered later on, and it can be easier to evaluate if the effort of expatriation is worth it.

Furthermore, when looking at the criteria for expatriate selection, establishing some basic criteria with regards to the international environment can be beneficial. As situations differ a great deal this can be difficult. But by handling repatriates, one can get an overview of the similarities of problems that might have occurred. Finally, it should be stated that when considering expatriates evaluating their cross-cultural suitability can be very important. Some countries may not differ a great deal from the individual’s culture, while others can be very different and provide unanticipated difficulties for the expatriate if he or she is not suitable.

6.5 Implications for theory

The purpose of this study was to gain a better understanding of how Swedish MNCs select their expatriate managers, and thereby explore aspects in connection to this. This has come to include describing the basic reasons for why Swedish MNCs use expatriates and what roles they have applied, which are factors that influence the selection process. The selection process has further been described, and a part of the process, the criteria for selecting expatriates has been emphasized. By answering the research question the study has begun to explain some aspects of how Swedish MNCs select their expatriate managers.

The roles of an expatriate were looked at. However, most of the roles did not apply to the present study. Also, the present study found that the informal selection process could be applied to the three cases, while it could not distinguish whether the selection was open or closed. Furthermore, the aspect of experience within the company or foreign assignments was found to be used as a criterion for expatriate selection.

6.6 Implications for future research

During the process of this study some aspects were discovered which were related to other areas of research. Such aspects can be presented as implications for future research as they were not investigated for the present study since they were not within its scope.
FINDINGS, CONCLUSIONS AND IMPLICATIONS

Firstly, as the subject of expatriate selection arose, it was stated that the process did not differ a great deal from the regular employee selection. Some aspects of the process were only briefly reviewed as it had already been addressed during the initial employee selection. It would be interesting to further look at how the process of employee selection could be described.

The present study could be further developed to include a quantitative study in order to provide a wider picture of how Swedish MNCs select their expatriates.

As this study only included Swedish MNCs it could be interesting to see how it compares to other European companies, or how Swedish and European companies compare to Asian or American companies.

The theory concerning the eight step process of expatriate selection looked at the assessment of IQ competencies but the three main categories were not further emphasized. One could look at how MNCs evaluate analytical, practical and creative intelligence through formalized tests.

It has been stated that expatriates’ families influence the success or failure of expatriates. It would be interesting to go deeper into this subject and try to discover what family characteristics would affect the expatriate success. One could also further investigate why companies tend not to see to the expatriate families as a part of the selection process.

Furthermore, the literature review looked at the current expatriate profile. It can be recommended to look at Swedish MNCs and try to find what the average expatriate is like. One could also look at countries other than Sweden.

When looking at the sample selection an interesting issue arose. It could be interesting to further explore why the companies differ when it comes to how many expatriates are currently used, in relation to how many employees they have. It might be a factor which is influenced by the degree of internationalization or organizational establishment.

The present study found that vacancies were not advertised externally. One could try and find a sample selection where external advertising occur, and see how it influences the motives, selection process and criteria.
7 List of References


**Websites**


**Interviews**

Mattias Ehnhage, SCA. 2007-12-03.

Magnus Åberg, Handelsbanken. 2007-12-03.

Angelika Kjelldorff, Electrolux. 2007-12-06.
Appendix – Interview Guide

General information and background
- Company name
- Name of respondent
- Respondent’s job-title
- Brief business description
- Number of countries where the company operates
- Number of expatriates who are currently abroad
- What positions are the expatriates currently at?

Motives for sending managers abroad as expatriates
1. Describe the company’s basic reasons for sending managers abroad.

2. What is the company’s opinions regarding the following reasons:
   - Suitable host-country nationals are not available
   - Development of manager
   - Development of organization

3. How would the company describe the roles of the expatriate managers?
   - Agent of direct control
   - Agent of socialization
   - Network builder
   - Boundary spanner
   - Language node

Expatriate selection process
4. Describe the company’s expatriate selection process.
   - Are selection criteria defined?
   - Are the measures of selection defined?
   - Does the company provide specific training for selectors?
   - Is there open advertising of vacancies?
   - Is there a panel of selectors who discuss the candidates?
   - How are nominations and recommendations looked upon?

5. What is the company’s opinion regarding the following aspects of selecting expatriates?
   - Identification of potential expatriate pool of candidates.
   - Assessment of IQ competencies of expatriate candidates.
   - Determination of learning styles of expatriate candidates.
   - Determination of thinking styles of potential expatriates candidates.
   - Determination of assignment task and its environments (internal/external).
   - Assessment of family characteristics.
   - Development of repatriation program prior to expatriation.
   - Selection of expatriate candidates and assignments.

Criteria for expatriate selection
6. What are the basic criteria when considering who to select for abroad assignments?

7. What is the company’s opinion regarding the following factors of selection criteria?
- Technical ability
- Cross-cultural suitability
- Family requirements
- Country/cultural requirements
- Language
- MNC requirements
- Current job performance
- Personality traits/attributes
- Interpersonal skills
- Individual motivation
Appendix – Intervjuguide

Bakgrundsinformation
Företag
Namn på respondent
Respondentens jobbtitel
Kort beskrivning av företaget
Antal länder som företaget har verksamhet i
Antal expatriater som för nuvarande är utomlands
Vilka positioner har expatriaterna?

Motiv för att skicka managers utomlands som expatriater
1. Beskriv företagets grundläggande orsaker för att skicka managers utomlands som expatriater.

2. Vad är företagets uppfattning om följande orsaker:
   - Det saknas lämpliga personer i värdlandet
   - Utveckling av managers
   - Organisation utveckling

3. Hur skulle företaget beskriva expatriatens roll?
   - Agenter för direkta kontroll
   - Agenter för socialisering
   - Nätverksbildare
   - Gränsvidgare
   - Språk nod

Process för val av expatriater
4. Beskriv företagets process för val av expatriater
   - Är valkriterier definierade?
   - Finns det definierade mätredskap?
   - Tillhandahåller företaget speciell träning för dem som väljer expatriater?
   - Är det öppen annonsering av lediga platser?
   - Finns det en urvalspanel som diskuterar kandidaterna?
   - Vad är synen på nomineringar och rekommendationer?

5. Vad är företagets åsikt angående följande aspekter på urvalsprocessen?
   - Identifiering av en möjlig pool av expatriat-kandidater.
   - Utvärdering av expatriat-kandidaters IQ-kompetenser.
   - Fastställande av expatriat-kandidaters inlärningsstil.
   - Fastställande av expatriat-kandidaters sätt att tänka.
   - Fastställande av arbetets uppgift och dess interna och externa omgivning.
   - Utvärdering av familjens typiska egenskaper.
   - Utveckla repatrieringsprogram före avresa.
   - Val av expatriat-kandidater och arbetsuppgifter.

Kriterier för val av expatriater
6. När man överväger kandidater, vilka är de grundläggande kriterierna?
7. Vad är företagets åsikt angående följande urvalskriterier?
   - Teknisk förmåga
   - Korskulturell lämplighet
   - Familjens behov
   - Landets/kulturens behov
   - Språk
   - Företagsbehov
   - Nuvarande jobbprestation
   - Personlighetsdrag/attribut
   - Social kompetens
   - Individens motivation