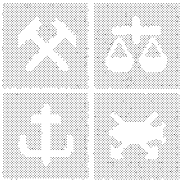


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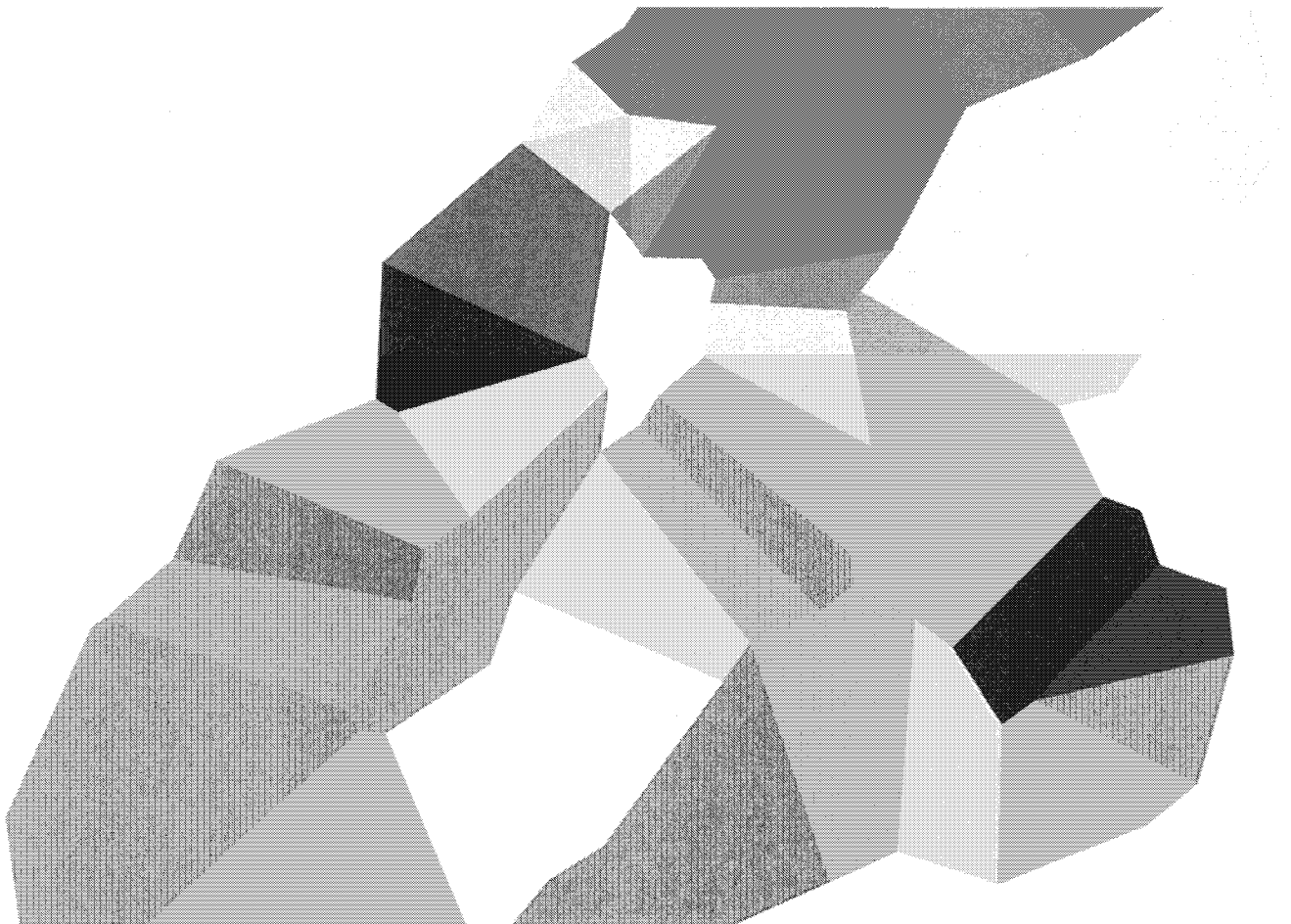


BE309 E International Business

The “Secrets” of Successful Expatriation

A multiple case study of expatriation management in
Innovation Norway and ConocoPhillips

Written by:
Trine Lise Hornæs (HHB) and Mia-Christin Madsen (NHH)
Spring 2013



Abstract

This thesis aims to disclose the “secrets” of successful expatriation in the case companies Innovation Norway and ConocoPhillips. The method applied is a multiple case study, where we have used an inductive approach with semi-structured interviews to answer our research questions:

The academic literature contains a series of recommendations for successful expatriation: To what extent do the actual experiences of the largely successful expatriates in our two case companies deviate from these ideals? Are potential deviations best understood in terms of a cultural or pragmatic perspective?

We found that the reality in Innovation Norway and ConocoPhillips deviates from the recommendations in the expatriate literature on several aspects throughout the Expatriation Cycle. Our findings support that the pragmatic perspective contributes to a superior understanding of successful expatriation. We argue that the expatriates are able to manage well in an international context, as long as the pragmatic aspects are sorted out. We found little evidence supporting the cultural perspective, and concluded that it is better used as a supportive means in the expatriation process. It is important to notice that the perspectives are not mutually excluding, and that both can be prominent depending on the context.

Our study suggests that HR management should focus on pragmatic aspects in expatriation management to achieve successful expatriation. With this, we mean that HR should create a package that contains work for the expatriate, housing, schooling for the children, and activities for the spouse. An important aspect of the package is also general support and contact for the entire family throughout the expatriation process.

Preface

This thesis is written as the final part of our master degree in Master of Science in Economics and Business administration, specializing in International Business. The thesis is written as collaboration between two students from Norwegian School of Economics and Bodø Graduate School of Business. We would like to thank NHH and HHB for allowing us to write it together.

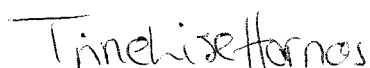
Performing a qualitative study on expatriation would not have been possible without the help from our case companies Innovation Norway and ConocoPhillips. We would like to express our gratitude towards the HR representative in the case companies, and their expatriates for taking the time to share their experiences with us. We are grateful for their openness and honesty, giving us valuable insight in the life of an expatriate. We would also express our gratitude to Njål Andersen from ASC for sharing parts of his course and much of his extensive knowledge on expatriation.

The thesis was supervised by Paul Gooderham at NHH and Tor Korneliussen at HHB. We would like to express our gratitude to Paul Gooderham for extensive guidance and constructive suggestions throughout the entire process. Furthermore, we would like to thank Tor Korneliussen for challenging questions and helpful feedback.

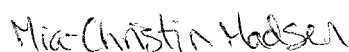
We also recognize all the help we have been given from friends and colleagues who supported us during the thesis. Additional thanks to our Manx hero.

Lastly we want to thank each other for the companionship during this process, and for making it enjoyable to the end. Heroes of the day – heroes of the night!

Bergen, June 2013



Trine Lise Hornæs



Mia-Christin Madsen

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1 Introduction

In this chapter we will introduce the purpose of the thesis, along with relevance and the research questions. We complete the chapter with an introduction to our case companies, in addition to a short description of the thesis structure.

1.1 Purpose

Internationalization has led to an increasing number of expatriate employees (Bonache, et al., 2001). With an *expatriate* we mean an employee who is working and temporarily residing in a foreign country (Dowling, et al., 2008). It has been argued that it is a competitive necessity to have a workforce that is fluent in the ways of the world (Black & Gregersen, 1999). Therefore, "*organizations that wish to succeed in this era of globalization are realizing that they must turn to international markets to remain competitive*" (Olsen & Martins, 2009, p. 311). Continuous expansion in the internationalization of organizations has led to greater challenges for Human Resource Management (Gooderham & Nordhaug, 2010), HR, as many companies are dependent on expatriates as a part of their internationalization strategy (Collings, et al., 2007).

The expatriate literature indicates a quite high failure rate (Olsen & Martins, 2009; Reiche & Harzing, 2009; Collings, et al., 2007; Black & Gregersen, 1999), but there are reasons for doubting these high numbers (Varner & Palmer, 2005; Reiche & Harzing, 2009). Christensen and Harzing (2004) question the traditional view on expatriate failure when they argue that expatriate failure is not connected to premature return. A large amount of research attempts to understand the challenges with repatriation, and give advices on how to manage the repatriation process to avoid failure (Lazarova & Cerdin, 2007). With *repatriation* we mean the process of bringing the expatriate back to the home country and into a (new) position. Many International Assignments, IAs, do not follow the ideal Expatriation Cycle, either because the expatriate get a new position or move to a new IA before the original IA is completed. If failure were connected to premature leaving, these cases would be defined as failure even when expatriates are moving within the same company (Christensen & Harzing, 2004). An exaggerated focus on avoiding failure can however lead to companies missing important issues leading to success (Reiche & Harzing, 2009).

Instead, Christensen and Harzing (2004) focus on expatriate turnover and performance management from an HR perspective, where the IA is seen in relation to the international strategy of the company. They argue that work satisfaction and organizational commitment are important factors impacting employee turnover, especially in the expatriate context. Both aspects are affected by how much the new position leverages the knowledge acquired abroad. Other scholars supporting the view are focusing on the lack of organizational attention and support as a reason for the high turnover among expatriates (Lazarova & Cerdin, 2007).

This thesis will focus on disclosing the “secrets” of successful expatriation, where we will try to increase academic and practitioner understanding of the expatriate literature. The literature can be divided into two perspectives. The *cultural perspective* argues that culture matters in the international context (Hofstede & Hofstede, 2005; Trompenaars & Hampden-Turner, 1998), whereas the *pragmatic perspective* argues that other conditions are of greater significance for expatriation (Neyer & Harzing, 2008). It is important to notice that the perspectives are not mutually excluding, and that both can be prominent depending on the topic.

From the cultural perspective, the literature emphasizes the importance of understanding culture to function well abroad (Varner & Palmer, 2005; Neyer & Harzing, 2008; Li, et al., 2013; Hofstede, 2013). Culture may be seen as both a product and as a process. As a *product*, culture expresses the accumulated knowledge that has been handed down from our ancestors. As a *process*, culture is continuously renewed each time newcomers learn the current ways of thinking and acting (Jacobsen & Thorsvik, 2007). Culture matters because peoples’ cultural background will affect their values and preferences regarding management and leadership. National culture is also said to affect how people form relationships, and their behavior (Neyer & Harzing, 2008; Hofstede & Hofstede, 2005; Trompenaars & Hampden-Turner, 1998). A need to understand the host country culture and ways of adapting to it is often emphasized as the basic of expatriate success (Varner & Palmer, 2005). Based on this, aspects such as Cultural Intelligence, CQ, cultural-, and language courses will be of great importance to obtain expatriate success.

In contrast, the pragmatic perspective believes that other conditions are of greater significance for expatriation. Even though culture influences individual outcomes, the literature supporting this perspective argues that this relationship is based on a very weak statistical significance. Instead, other factors such as personality, leadership, and support from HR are believed to overrule culture (Neyer & Harzing, 2008). Based on this, aspects such as the work task, the living situation, support for the family, schooling for the children, and activities for the spouse will be of great importance to obtain expatriate success. A package consisting of appropriate benefits to compensate the expatriate and support from HR to the entire family is more important than culture.

The purpose of this thesis is two-fold. We first *seek to identify deviations from the recommendations for successful expatriation described in the expatriate literature*. Secondly, we *use the two perspectives, the cultural and the pragmatic, to see which of them better describes the deviations, and hence contributes to a superior understanding of successful expatriation*. This will disclose the “secrets” of successful expatriation.

Building on the Literature Review in Chapter 2, we have developed an expatriation model where we divide the expatriation process into three stages. *The first stage* consists of the period from the expatriates leave the home country to they settle abroad. *The second stage* consists of the time abroad, whereas *the last stage* covers the repatriation process. We focus on successful expatriation of Norwegian expatriates, through our case companies Innovation Norway and ConocoPhillips. Our choice of companies is driven by a need to have two rather different companies. One is a Norwegian state-owned enterprise, while the other is a US multinational company. This increases the generalizability of our findings.

1.2 Relevance

Looking into how companies can better utilize the benefits of expatriation is important as expatriation involves large costs and risks for both the company and the expatriate in question. Expatriation involves many benefits, but it also entails costs. The expatriate must be compensated for spending time abroad, maintain their purchasing power, as well as being offered monetary incentives to take on an IA (Bonache, et al., 2001). It is important that the cost does not outweigh the benefits. Expected benefits of an IA are not always realized, and the cost of a failed IA can be many times the cost of hiring a

local (Carragher, et al., 2008). In addition to the financial cost there are the “invisible” costs of expatriation failure, as failing overseas that can lead to loss of self-esteem and self-confidence for the expatriate. It can also entail loss of prestige among their peers for both the individual and the company (Mendenhall & Oddou, 1985).

To avoid risks and increase the chance of success, the company needs to follow through on every step of the Expatriation Cycle. Both before the IA in the selection- and training process, during the IA with mentoring and communication, and maybe most importantly, during the repatriation process to avoid reversed culture shocks and feelings of not being appreciated for their work and new knowledge.

1.3 Research Questions

Our two case companies recognized that they had some shortcomings in their expatriation process, and that they both wanted to improve their routines on the matter. The main problem for HR was to follow the expatriates throughout the Expatriation Cycle, leading to the companies not being able to leverage the full benefits of expatriation upon repatriation. As both companies reported a failure rate close to zero, we focus on successful expatriation of Norwegian expatriates. By *success* we mean that the expatriate completed the IA and that the expatriate and the family of the expatriate have had a meaningful life abroad. Based on these findings we formed a set of related research questions:

The academic literature contains a series of recommendations for successful expatriation: To what extent do the actual experiences of the largely successful expatriates in our two case companies deviate from these ideals? Are potential deviations best understood in terms of a cultural or pragmatic perspective?

We also aim to identify the implications for the cultural and pragmatic perspective recommendations in the academic literature. In addition to our research questions, we made a few assumptions about expatriation. (1) We assume that the cultural perspective is an important criterion for a successful IA. (2) We also assume that there is a need for more support from HR throughout the entire Expatriation Cycle. (3) Our last assumption is that expatriation is in many ways easier than repatriation.

1.4 Empirics

Innovation Norway is a state owned organization, working as a supportive means for innovation and development for Norwegian enterprises. Focusing on entrepreneurship and innovation, they use their extensive network of services to enable Norwegian businesses to grow and enter new international markets. In addition, Innovation Norway market Norway as a tourist destination throughout the world.

The American company ConocoPhillips is the largest international operator on the Norwegian continental shelf. Their operations as an independent upstream company in the oil and gas industry include worldwide exploration, production, transport and markets for multiple oil and gas products.

In other words our study involves two ostensibly different expatriating organizations. They are different in terms of ownership, nationality, industry, and degree of internal diversity. Further explanation about their operations and international strategies are presented in Chapter 3.2 together with an introduction to ASC.

1.5 Structure

This thesis is divided into five chapters, where Chapter 1 provides an introduction to the topic that will be analyzed in this thesis, and an introduction to the two perspectives of the expatriate literature. The following chapter gives an introduction to relevant literature on expatriation, and goes through all the recommendations for achieving successful expatriation. We conclude this chapter with our own three-step model that we will use in the analysis. Chapter 3 contains a discussion of the choice of our applied research design and an introduction to the case companies that will be used as the context of the analysis. The chapter is concluded by pointing to some limitations and weaknesses of our chosen methodology.

In Chapter 4 we present our findings and analyze them based on the model developed in Chapter 2, including a company comparison where we highlight to what extent the reality in the case companies deviate from the literature. The last chapter will present our recommendations for the two companies. In addition, it contains implications for HR management and the expatriate literature.

2 Literature Review

This literature review highlights the recommendations for achieving successful expatriation given in the academic literature, and is intended to be incisive rather than comprehensive. We start with the strategic basis for expatriation, before we go through the Expatriation Cycle, a central model in the expatriate literature. We will also give an introduction of the major differences supporting the pragmatic- and the cultural perspective. The chapter is completed with the development of our own three-step model that forms the basis for presentation and analysis of our results in the following chapters.

2.1 International Staffing

According to Collings et al. (2007), many companies underestimate the complexities of international staffing. To avoid problems with geographical distance and lack of day-to-day relationships, companies must take a more strategic view on their international staffing arrangements (Dowling, et al., 2008). *Expatriation* is one strategy companies use to face the challenges of an increasingly global marketplace (Cain, 2009). Time spent abroad varies generally from two to five years (Reiche & Harzing, 2009), and it is often home-country managers or employees with high skills that are sent on IAs. Expatriates spend time abroad with a defined point of closure, where they complete clear work related tasks. As they are living abroad for an extended period of time they are also dependent on interaction with local counterparts to achieve their goals. Bonache et al. (2001) argues that in companies with a high level of global integration, there is a need for higher coordination, which could be fulfilled by using expatriates.

Alternative forms of IAs are also of growing importance (Collings, et al., 2007), as high costs and staff immobility forces companies to use more “non-standard IAs.” *Rotation* is an alternative, and can be defined as employees commuting from their home country to work in another country for a short, set period of time, followed by a period of time off in their home country (Welch & Worm, 2006). Contrary to a typical IA, the family does not relocate with the employee. However, there are concerns about the stress built up from the extensive travel commitments, and how this can impact personal relationships over time (Collings, et al., 2007).

2.1.1 Expatriate Staffing Strategies

The international staffing strategies can be divided into four categories (Dowling, et al., 2008; Reiche & Harzing, 2009), whereas we will only review the ethnocentric- and the geocentric approach, as these strategies are used by the case companies. The *ethnocentric approach* employ expatriates in key positions (Dowling, et al., 2008). The benefits of this approach are higher certainty about the skills, business expertise, and the loyalty of the expatriate (Gooderham & Nordhaug, 2010). It also enables transfer of the headquarters' culture to the subsidiary, and opens up for more effective communication (Dowling, et al., 2008). For host country nationals the company may be perceived as a dead-end career vise, while the company risk facing negative reactions from the host country's government (Gooderham & Nordhaug, 2010).

The *geocentric approach* involves recruiting the best candidate for a position regardless of nationality (Gooderham & Nordhaug, 2010; Dowling, et al., 2008). The benefit of this approach is that the skills and knowledge of the individual is in focus, enabling the company to develop a pool of candidates to choose from. A geocentric approach also reduces national identification within the company (Dowling, et al., 2008). The drawbacks of this approach are somewhat similar to the ethnocentric approach, including increased training and relocation costs (Gooderham & Nordhaug, 2010). This approach also requires centralized control of the staffing process. Many host countries use immigration laws to make sure that host country nationals are employed whenever possible (Dowling, et al., 2008), making it difficult to use the geocentric approach.

Collings et al. (2007) argue that it is not possible to use a standardized approach to international staffing, which makes it essential to develop HR policies and procedures that are adapted to the various forms of IAs and their different complexities. The challenge is not just to formulate a strategy, but also to put the strategy into action at the operational level. The HR department must ensure that each IA has goals that are clearly defined, and that the chosen strategy fit with the goals of the IA (Collings, et al., 2007). Some scholars have criticized these orientations for being centered on headquarters. The staffing approaches are often initiated there and imposed on the subsidiaries leaving little autonomy and flexibility in the staffing process (Reiche & Harzing, 2009).

2.1.2 Strategic Motives for the Use of Expatriates

There are many reasons for using expatriates, and we will focus on three of them. The first is *position filling*, which is used if qualified host country nationals are not available (Collings, et al., 2007). Many expatriates are sent abroad to fill a technical need (Brock, et al., 2008), whereas others are sent to generate and transfer knowledge or technology to fill a skill gap (Bonache, et al., 2001; Brock, et al., 2008). Depending on the type of position and the knowledge involved, companies will hire a host country national or transfer an expatriate with the suitable skills and experience (Dowling, et al., 2008).

Management development is the second strategic reason, where the goal is to achieve individual development (Collings, et al., 2007; Black & Gregersen, 1999). An employee can be moved abroad as a part of training, for development purposes, or to assist in the process of developing common corporate values within the company (Dowling, et al., 2008). Expatriation is an important step in developing global managers with an understanding of international business. Some expatriates are even encouraged to gain international experience before they rise into top management positions (Carraher, et al., 2008; Shay & Baack, 2004; Dowling, et al., 2008).

The last strategic approach is as a means of *organizational development*. Many companies need to increase knowledge transfer or to exploit global market opportunities (Dowling, et al., 2008). Expatriates can act as a bridge between the headquarters and the subsidiary, and fulfill a desire to improve control and coordination. Their role allows both direct and indirect control, making them valuable for companies. The amount of control needed is depending on factors such as geographical- and cultural distance (Brock, et al., 2008; Shay & Baack, 2004). Using expatriates as a means of organizational development could also be done to modify and sustain the organizational structure and decisions processes within the company (Collings, et al., 2007).

The three motives are not mutually exclusive, and expatriates could be used as a combination of them. It is important to point out that these typologies only provide a useful starting point for considering why companies use expatriates (Collings, et al., 2007), and to show how expatriation can be used as a strategic tool for achieving organizational goals and needs (Reiche & Harzing, 2009).

2.2 The Expatriation Cycle

According to Bonache et al. (2001) research on expatriation has a tendency to follow the Expatriation Cycle. Early studies focused on recruitment, selection, and training, while recent studies focus on repatriation. The expatriate literature includes several ways of classifying the stages in the cycle, even though some contain more steps than others, the main ideas seem to be consistent throughout (Bonache, et al., 2001). In this thesis we consider the Expatriation Cycle to consist of six different steps, as seen in figure 1, and we will in the following present the academic recommendations given to achieve successful expatriation for each of the steps in the Expatriation Cycle.

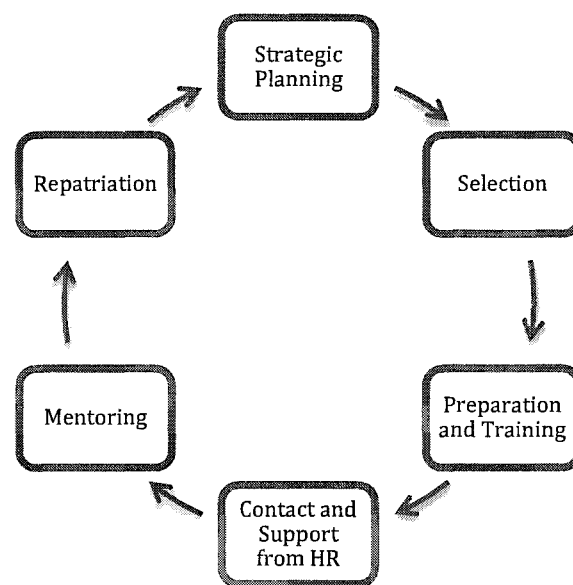


Figure 1: The Expatriation Cycle

2.2.1 Strategic Planning

The Expatriation Cycle starts before checking the pool of candidates, through the *strategic planning stage*. As expatriates can be used as strategic tool, it is important to take a strategic approach to the whole Expatriation Cycle. The purpose for an IA must be clearly identified to provide clear benefits to the company, and should have clear business goals to meet the business needs (McNulty & Tharenou, 2004). According to Black and Gregersen (1999), “an international assignment is the single most powerful experience shaping the perspective and capabilities of effective global leaders. It also happens to be the single most expensive per-person investment that a company makes in globalizing their people. It is unfortunate that most firms are getting anemic returns on this substantial investment” (1999, page 2).

Some IAs might be seen as failures in the short-term, as important goals were not completed. However, in the host country context they might have established valuable relationships that will increase the overall long-term benefits for the company (Christensen & Harzing, 2004). Many companies use IAs despite the costs, even when less costly options are available (McNulty & Tharenou, 2004). The simple cost of expatriation is only a factor in the equation, while the reasons for sending an expatriate abroad might go beyond an immediate business need. With today's international markets, companies need their employees to gain valuable international experience (Black & Gregersen, 1999).

2.2.2 Selection

After establishing the purpose of an IA one can start looking at the selection process. Much research has been conducted on the selection process (Bonache, et al., 2001), as it is an important step in finding the right individual for an IA. Research has indicated that while the selection criteria are largely constructed by the HR department, in reality the actual selection decision is less organized and coherent, even done by line managers ignoring the criteria (Bonache, et al., 2001; Harvey, et al., 2009).

The focus has been on "visible" aspects such as selection criteria, where technical expertise and domestic track record have been found to be more dominant than language skills and international adaptability (Black & Gregersen, 1999; Gooderham & Nordhaug, 2010). With urgent business needs abroad, salient factors other than technical expertise might be overlooked (Gooderham & Nordhaug, 2010). Bonache et al. (2001) argue that the selection of candidates is done from a pool of candidates the decision makers are confident about. These individuals have built a level of trust with their superiors, and are considered to act in the best interest of the company compared to an unknown local candidate (Collings, et al., 2007). Some companies have resorted to use a "self-selection" process, where the selected expatriate have the proper technical skills and exhibit a desire to go abroad (Hays, 1974).

Technical skills are not necessarily enough on its own to guarantee success and beneficial results for the company. Many companies fail on this practice, believing that managers who succeed at home also will be successful abroad in a different cultural environment (Krell, 2012). Scholars have argued that companies have frequently failed

to consider the degree of cultural intelligence in the selection process (Gooderham & Nordhaug, 2010). Successful companies assign IA to employees who also have the needed cultural skills to handle the cultural challenges, as adaption to the local environment and culture tend to benefit the outcome for the expat (Krell, 2012). There is a lack of widely acceptance for the need of including international adaptability, so this is rarely a selection criterion (Bonache, et al., 2001). According to Dainty (2008), considerable attention should be given to the competencies that need to be developed, and to the fact of whether the candidate has the ability and motivation to learn.

2.2.3 Preparation and Training

Many scholars have recognized the importance of preparation before an IA (Gooderham & Nordhaug, 2010; Shin, et al., 2007), and the nature of the IA is likely to determine the type of preparation. With *preparations and training* we mean all the activities that are necessary to complete the relocation process including training, support for the family, and support with moving and settling in the host country. Some IAs requires extensive interaction with locals, whereas others are entirely focused on technological aspects (Bonache, et al., 2001). Preparation and training must be adapted to the objectives of the IA and be linked to the expatriate's needs and experience (McNulty & Tharenou, 2004). Mäkelä et al. (2011) argues that the families should be included as soon as possible in the preparations and training process. However, research has shown that there is a lack of HR support, as the expatriates are often expected to assume the responsibility for their own training and development in relation to the IA (Collings, et al., 2007).

Some scholars argue that the expatriate's cross-cultural adjustment to the host country greatly influences the success of the IA (Caligiuri, et al., 2001). Many managers seem to be in doubt of the effectiveness of general or specific country training, whereas the expatriates tend to be very positive towards this type of training (Bonache, et al., 2001). To facilitate adjustment, many companies offer cross-cultural training teaching the expatriates about norms and appropriate behaviors abroad. *Cross-cultural training* can be defined as any intervention designed to help the expatriate operate effectively in the host country through increasing their knowledge and skills (Caligiuri, et al., 2001).

According to Caligiuri et al. (2001) cross-cultural training has three objectives. The first is that the expatriates should be able to determine the appropriate cultural behavior and perform their work tasks in the host country. The second objective is to help the expatriates to cope with unforeseen events in the new culture, and to reduce cultural conflicts. The final objective is to build realistic expectations with respect to the life in the host country, both professionally and privately (Caligiuri, et al., 2001). The pre-assignment training is designed to help the expatriate cope with culture shock and ease the adjustment process (Gooderham & Nordhaug, 2010).

Language is essential for communication, as expatriates in non-English speaking countries might need more social skills to develop relationships with host country nationals via social interactions (Shin, et al., 2007). Many companies offer language training as a part of the preparations (Gooderham & Nordhaug, 2010). This might help the expatriate to communicate to some extent with the locals. However, understanding words alone does not provide a full understanding of the culture (Caligiuri, et al., 2001).

Formal courses are only one part of preparations, and other means such as *pre-assignment visits* to the host country and informal briefings can be included (Bonache, et al., 2001; Harvey, et al., 2009). The pre-assignment trip has a dual purpose as it allows the family to gather information about the host country, and can help create a more realistic work preview. If the pre-assignment trip is organized such that the expatriate is able to carry out a work task, the trip might ease some of the unrealistic expectations the family might have, and hence avoid some initial disappointments (Harvey et al., 2009).

Preparation is done in the period before the IA, whereas the training can persist throughout the IA. It is argued that behavioral training is more effective after arrival in the host country, as expatriates tend to be more motivated to learn once they have started their IA (Shin, et al., 2007). It is important to notice that even with a thorough pre-assignment program, culture shock might still occur (Gooderham & Nordhaug, 2010), as it does not include a real-life experience of living abroad (Harvey, et al., 2009).

2.2.4 Contact and Support from HR

Abroad, the expatriates need some sort of contact and support from HR in their home office, to make sure that the IA is going as planned. As a basic minimum the expatriates should have access to the company's intranet. This gives them the opportunity to keep

up to date with activities in the home office, and will notify them if there are any major changes. According to Andersen (2013), one should give the expatriate a selection of contact points instead of just relying on e-mail while they are abroad. Not necessarily indicating that the expatriates will be in touch, but it shows that the company cares and that they are available if needed. Expatriates are heterogenic, indicating a need to adapt the support to their individual needs.

2.2.5 Mentoring

A new trend in expatriation is use of mentors. With *mentoring* we mean someone who guides, tutors, or operates as a trusted advisor for other individuals (Mentor scout, 2013). A mentor is often a more experienced organizational member who can support and provide counsel to less experienced colleagues. Extensive research has shown that the protégé enjoys great benefits of having a mentor in domestic settings. These benefits include more visibility, increased organizational knowledge, and career advancement. Mentoring has also been connected with lower turnover and work stress, in addition to higher work satisfaction. Having a mentor can also help the employee experience increased organizational identification due to the time and effort invested in making their IA a success (Sullivan, et al., 2008). With the success of domestic mentoring, one suggest that having a mentor both at home and in the host country, may enhance the expatriates' effectiveness. Home country mentors can be used pre-departure, where they can help the expatriates to mentally prepare for the forthcoming IA, and ensure that the expatriates have realistic expectations (Sullivan, et al., 2008).

During the IA it is suggested that the expatriates have mentors from the host country. The host country mentors may assist with accurate information about the office politics, and the new work environment. Helping the expatriates to develop a wider range of skills may help increase work satisfaction and performance (Sullivan, et al., 2008). As the expatriates are exposed to a foreign culture abroad, involving high levels of stress and uncertainty (Reiche & Harzing, 2009), a host country mentor can help with psychosocial support and give valuable insight to local norms and traditions. When the expatriates are abroad, it is important that the home country mentor informs about any changes at home office and encourage the expatriates to keep learning about the organizations worldwide operations (Sullivan, et al., 2008). When entering the repatriation stage, home country mentors can help the expatriates to adjust to any

changes that may have occurred while they were abroad. They can also help the transition back into the corporate culture, and may help decreasing the expatriates' reversed culture shock (Sullivan, et al., 2008).

2.2.6 Repatriation

The last stage of the Expatriation Cycle is repatriation. According to Klaff (2002), the key to successful repatriation is to have a full-circle repatriation program with support before, during, and after return. Repatriation begins before the expatriates leave the host countries, and does not end until they are back in their home country and settled back into their daily routines. Repatriation is somewhat overlooked by companies, while it involves major upheaval both professionally and personally for the expatriates (Black & Gregersen, 1999; Bonache, et al., 2001). Many employees end up leaving their company after return (Bonache, et al., 2001; Klaff, 2002). Combined with little research conducted on repatriation, large uncertainties exist about the level of personal and professional development of the expatriate during the IA. The research indicates that there are various problems during the repatriation process, and that companies struggle with managing the repatriation process successfully (Bonache, et al., 2001).

Many expatriates do not realize that coming home from an IA can be harder than leaving (Reiche & Harzing, 2009), as there is a tendency to expect that life upon return will be just the same as when they left. This is rarely the case as much has happened professionally while they were abroad (Klaff, 2002). Going abroad, the expatriates have support from the company, and have a certainty that the position is going to be meaningful and valued. The pressure is high while they are abroad and they accomplish a lot, and taking on an IA might also give increased social status.

Coming back is another story. It has been recommended that repatriation should start three to six months before departure (Black & Gregersen, 1999). The process of repatriation should also be linked to the purposes of the IA (McNulty & Tharenou, 2004). As this is not always true, returning expatriates often face an unsecure work situation, with temporary positions until the companies find something more permanent (Klaff, 2002). The companies help them moving back, they get a title and a wage, but not necessarily real work tasks. On the IA the expatriates most likely had a high position, and might be used to producing good results. If this is the case, the fall is noticeable, as

the new positions might entail less authority at a lower level than they had before leaving. This might be especially true for expatriates leaving from management levels, as moving down from management levels can be difficult to accept (Andersen, 2013).

It is also common to feel the organization has changed. Many expatriates have not been kept up to date with changes in the organization, in addition to them changing while they were abroad. Problems with adjusting back into the organization leads to many leaving their companies within a year of return. The expatriates return with new and useful experience and knowledge from their IA, however, companies often fail to utilize it. It has been argued that better career programs should be in place to ensure that companies are better able to leverage the competence gained abroad (Bonache, et al., 2001; Reiche & Harzing, 2009).

Expectations are crucial in the repatriation process, as they will impact the satisfaction level with the overall process (Stroh & Caligiuri, 1998). It is therefore important for HR to be involved in creating realistic expectations, both regarding work and personal lives following repatriation (Bonache, et al., 2001). Proper training and preparation programs can help ensure realistic expectations (Reiche & Harzing, 2009). Involving the expatriate in the relocation process could make them feel valuable and fairly treated in the process (Black & Gregersen, 1999), making the transition back easier. Expatriates coming back from an IA have high human capital and need help to find their place back into the company. Companies need to make sure that their repatriation process enables them to make use of their newly acquired knowledge and experience. According to Andersen (2013), the best solution is to help the expatriates see their competence, and match it with the competence needed in the companies. This matching may ease the process of finding a new position.

The entire family needs to readjust into the home country lifestyle (Bonache, et al., 2001). The spouses may re-enter the workforce, maybe after several years without working or after completing new education. The children must re-enter the home country school system, in addition to being older and have different needs than they had before they left. The entire family must also re-enter the social scene with their friends and family. In addition, the families face reversed culture shock, which can be just as bad as culture shock when going abroad.

Problems in the repatriation process can affect the companies' abilities to realize the benefits of expatriation. A well-organized repatriation process can help avoid turnover, and should be a special point of attention with regards to talented and high performing employees. If the competence of the expatriate is internalized upon return, it can improve the companies' strategic capabilities (McNulty & Tharenou, 2004) making it important to manage the repatriation process appropriately.

2.3 The Cultural Perspective

One perspective in expatriation literature is based on *culture*, which Hofstede (1980) defined as "*the collective programming of the mind distinguishing the members of one group or category of people from others.*" The key part of success in IAs is a person's willingness and ability to learn the social skills that are relevant for facilitating achievement of the IA (Bochner, 2006). The psychological effects on the expatriate involve both cultural learning of how to live and work within the local paradigm, but also an emotional adjustment as many experience culture shock upon arrival. The family can be an important factor with regards to the success rate of the IA, as lack of family adjustment is the most common reason for failure (Harvey, et al., 2009; Hays, 1974; Handler & Lane, 2011).

An important concept in the cultural perspective is *cultural intelligence, CQ*, which refers to "*a person's capability to adapt effectively to new cultural contexts*" (Earley & Ang, 2003, p. 59). CQ is the key competence that allows interaction with people from different cultural backgrounds (Li, et al., 2013). According to Earley and Mosakowski (2004), CQ is not a born trait, but rather a dynamic end state, indicating that one can develop CQ. Li et al. (2013) showed that CQ develops over time, and that international experience provides cultural exposure to develop ones CQ.

CQ can be divided into three facets. *Cognitive CQ* can be said to be ones knowledge of norms, practices and customs in different cultures (Li, et al., 2013; Earley & Mosakowski, 2004), and refers to one's ability to look at cultural cues and develop patterns based on both cognitive and metacognitive abilities. A *metacognitive ability* is one's ability to acquire and understand cultural knowledge (Li, et al., 2013). Knowledge about the differences is not enough, as one need to understand that differences in fact exist, before one can evaluate the situation and embrace the uncertainty (Earley & Mosakowski,

2004). *Motivational CQ* refers to interest in cultures and interaction with people from other cultures (Li, et al., 2013). People with high motivational CQ will not give up when they face obstacles or failure (Earley & Mosakowski, 2004). *Behavioral CQ* refers to the ability of selecting appropriate behavior in accordance to cognition and motivation, and to behave appropriately both verbally and nonverbally in interaction with other cultures. However, as behavior changes over time, behavior is not always appropriate, even though one knows how to act (Li, et al., 2013).

Culture shock refers to the experience of psychological disorientation when finding ones cultural environments radically different. The shock comes from the anxiety caused by loss of cultural artifacts when entering a new culture. It is a result of a series of experiences, and does not come over night. Culture shocks are experienced differently, ranging from mild irritations, to deep psychological panic or crisis. According to Ferraro (2006), everyone experience culture shock to some extent, and how one handle the psychological adjustments can affect whether an IAs ends as a success or failure. Culture shock can be seen as a barrier, but it also entails unique possibilities for learning and challenging assumptions of one's own culture (Li, et al., 2013). Even though there are several symptoms of culture shock, it is unlikely that one will experience all of them.

According to Ferraro (2006), culture shock usually occurs in four stages. In *the honeymoon stage*, lasting from a few days to several weeks, one has just started an IA and attitudes are generally positive. Feelings of euphoria, excitement, and joy are common at this stage. The view of one's capacity to live and work in the new country is unrealistically positive. Many stay temporarily at hotels with high standards while they settle with housing and school for the children. The focus is on the similarities with one's home culture, and one realizes that things are not so different after all.

In the *irritation and hostility stage* one realize that the honeymoon feeling do not last forever and one starts to encounter problems. Having lived in a new culture for a while one realize some of the differences, and problems start to occur with aspects one normally would have taken for granted. What used to be small problems turns into major obstacles, and the focus shifts to the cultural differences. When reaching this step one realizes that the IA is not a vacation, but that it actually will last for years to come. The symptoms of culture shock start to appear and the crisis set in. To overcome this

stage it is not uncommon to bond with other expatriates and disparage the locals. The time spent in this stage depends directly on the success of the IA. Some never get past stage two, leaving them with two options; either stay at high costs for both themselves and the company, or to leave the IA prematurely, regarded as expatriate failure.

Those who overcome the second stage enter the *gradual adjustment stage* where the crisis is over and recovery starts. This might happen so gradually that many do not even realize that they have started to understand how to survive in the new culture. Once one has achieved understanding of the cultural behavior, things make much more sense and the cultural environment becomes more predictable. The small problems from the previous stage are diminishing, and some might even start to master the new language, giving them greater opportunities for success in the new culture. Being able to laugh at the situation is a great sign of recovery.

In the final stage, *biculturalism*, one has fully recovered and is able to function effectively in both cultures. An appreciation of local customs and acceptance of them start to emerge, some will even miss them once they return to their home country. Not all intercultural strains are disappearing, but the anxiety that was there in the beginning is now gone. Only a few will reach a full recovery and get to this last stage of culture shock, but it is possible to survive by reaching the third step. However, entering the bicultural stage makes the IA a truly positive and educational experience.

Coming home from an IA can be even harder than leaving, where expatriates face numerous changes, often referred to as *reverse culture shock* (Klaff, 2002). Some of the repatriation issues can occur due to an idealized view of home, and due to the expectations of total familiarity and disconfirmed expectancies, both personally and professionally (Wulfhorst, 2012). It can take as much as nine months up to a year before the expatriates have settled back into work and found a way to leverage their international experience (Klaff, 2002). The expatriates also need to re-enter the social life, whereas the spouse often have to re-enter the workforce. There may have been professional changes at work, requiring adapting to a different corporate culture. Furthermore, many are often placed in temporary positions with a loss of both status and salary level, making them feel as they are being put on hold. Colleagues may also be ambivalent and get tired of hearing stories about the life abroad (Klaff, 2002).

According to Andersen (2013) the reversed culture shock has three stages. In *the star stage*, the expatriates have just returned from an IA and attitudes are generally positive. They are in a problem-solving state where the stress of return to the home country is still present, but they solve problems as they occur. The returning expatriates and their families are faced with a great deal of choices, and plenty of paperwork. The first stage is characterized by time pressure, which might lead to bad decisions.

The expatriates enter *the reality orientation stage* when things start to calm down, and they manage to get a grip on their new reality back in the home country. After a stressful star stage this stage can feel like an anticlimax, as it gets quiet. The main decisions and paperwork are done, and one realizes that the social network is not as strong as it used to be. Some even come back to a lower standard of living compared to abroad, and might have lost luxury perks such as a maid and a driver. If the expatriates did not take the time to land properly and make good decisions in the star stage, the reality orientation stage can hit them pretty hard, and they might experience reversed culture shock. Once the reality has set in, the expatriates moves on to the last stage; *adaption*. The expatriates and their families need to re-adjust back into their positions and school situations. Maybe most importantly, they need to strengthen their social network and go back to the daily life in the home country.

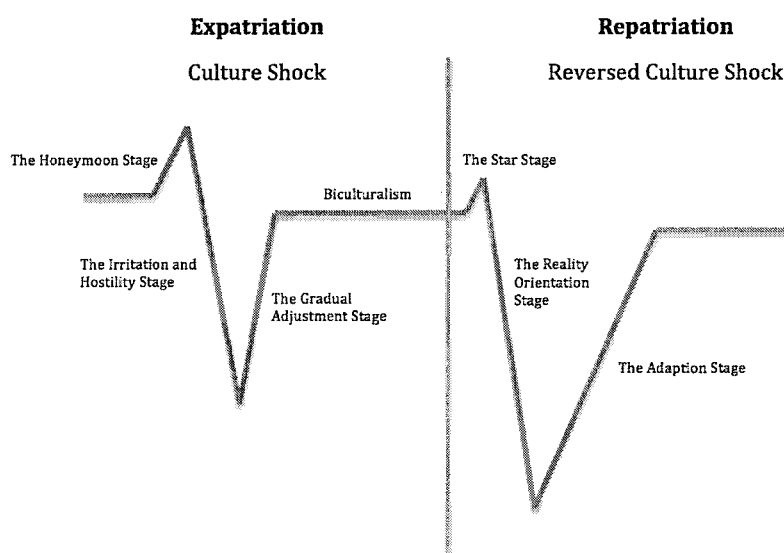


Figure 2: The Culture Shock Model

The development of culture shock can be seen in the Figure 2 above, which shows spirits starting out quite high in both moves. Going abroad, the honeymoon stage lifts the spirit to an even higher level, before one enters a big drop in the irritation and hostility stage. The same movement can be seen upon return where the star stage lifts the spirit before they move into an even larger downfall in the reality orientation stage.

2.4 The Pragmatic Perspective

In contrast, the pragmatic perspective believes that other conditions than culture are of greater significance for expatriation. There has been a lot of criticism directed at the dominating cultural theory, with relations to reliability and validity, and that the theory is based on generalizations (Faure & Fang, 2008). McSweeney (2002) points to cultural theories leading to stereotyping, and that national culture is not adequate enough to describe individual behavior.

Looking at IAs from a pragmatic perspective the focus is on offering a complete expatriate package, including appropriate benefits to compensate and support the expatriates and their families. The pragmatic perspective argues that culture is overruled by more structural aspects, such as the work situation for the expatriate, the living situation abroad, in addition to enrolling the children in a school or daycare. The basis for success is that the expatriates and their families are able to feel that they master life abroad, and that their lives have a meaningful purpose.

The family situation is a major factor for a candidate considering taking on an IA (Gooderham & Nordhaug, 2003). For the companies, families entail more cost in form of moving, schooling for the children, and practical support. To facilitate adjustment, families should be provided with information about life abroad. This could be done through talking to previous expatriates, and preferably also their spouses. If they have been assigned to the same country it could give a more precise impression of life abroad, and similarities in family situation can help prepare for some of the challenges that might occur. It is also recommended for HR to have a heart-to-heart conversation with the spouses to clarify the expectations and answer any questions they may have (Frazee, 1996). This should be done to avoid candidates rejecting the opportunity to go abroad or postpone raising a family (Mäkelä, et al., 2011; Blackhurst & Cummins, 2005).

Some families are classified as *dual-career couples*, meaning that both partners earn an income to the family, in addition to being psychologically committed to their individual professions, as it is their main source of self-fulfillment. This area is gradually becoming more important and lacks research (Bonache, et al., 2001), as expatriation traditionally has been a male with a trailing wife. The act of balancing the lifestyle and career with both partners working is even more challenging in the international context (Mäkelä, et al., 2011). Highly skilled and educated employees eligible for an IA are more likely to have similar qualified spouses, leading to rejections of the IA if there are difficulties relocating the spouses in a position abroad (Harvey, et al., 2009). If this happens the company may lose good candidates, potentially affecting the overall success of the IA.

According to Harvey et al. (2009), not all companies offer spousal assistance for IAs. Only a few companies reported actual personnel policies, whereas many dealt with spousal issues on an ad hoc basis (Harvey, et al., 2009). The companies who have it, does not make the support-policies for spouses clear enough, whether it is helping them finding a position in the host country or providing support for education (Blackhurst & Cummins, 2005; Frazee, 1996; Mäkelä, et al., 2011). It is important to notice that these numbers were from American companies, but there is reason to believe that the same trends could be found in other countries as well (Harvey, et al., 2009). However, reasons like marital status, the trailing spouse's position in home country, and work visa can make it difficult to create policies related to dual-career couples. Many couples are left to solve the difficulties themselves, with little or no help from the companies (Handler & Lane, 2011; Mäkelä, et al., 2011).

When recruiting dual-career couples companies must recognize that a trailing spouse, who do not get a position abroad, will need more support than a traditional non-working spouse, due to the sacrifices of the spouses' career (Harvey, et al., 2009). For trailing spouses, an IA may cause them to lose their job twice, once when they go abroad and once again when they repatriate (Blackhurst & Cummins, 2005). The compensation package must reciprocate both partners working rather than just one (Harvey, et al., 2009). There is the risk of losing social security arrangements in Norway if the spouse seeks a position abroad, and paying for the social security rights is expensive (Arbeids- og velferdsetaten, 2013). Attaining a work permit might also be of hinder (Mäkelä, et al., 2011). In addition, the spouses, like the expatriates, take the risk of going abroad and

returning to a less desirable position upon repatriation. This might be even more salient for a trailing spouse as they are truly “out of sight, out of mind,” which implies that there is a need for accommodating a trailing spouse to maintain the pool of potential expatriate candidates (Harvey, et al., 2009; Mäkelä, et al., 2011).

2.5 The Expatriation Model

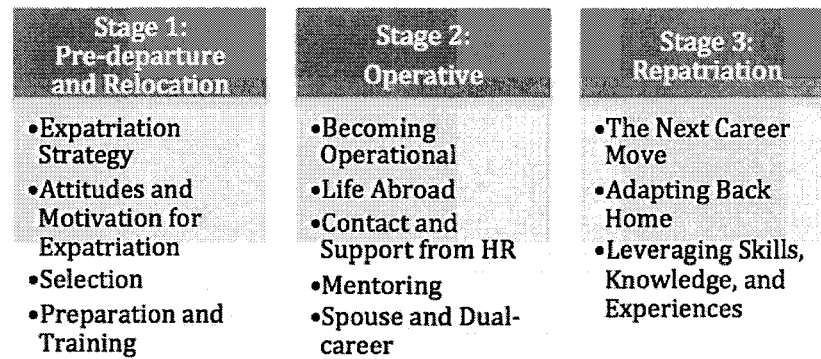


Figure 3: The Expatriation Model

Throughout this chapter we have presented the ideal of the expatriate literature. To increase the academic and practitioner understanding of the expatriate literature we have developed our own three stage model, combining the ideals of the Expatriation Cycle with the cultural and pragmatic perspective.

The first stage, *Pre-departure and Relocation*, includes the process from the beginning until the expatriates have arrived in their host countries. Everything that is done before departure is strongly connected to how the first face of the IAs turns out. The next stage, the *Operative* stage, involves the experience of working and living abroad for an extended period of time. The main focus in this step is the support from HR and mentoring. The last stage, *Repatriation*, starts with preparation for return until the expatriates are back and operative in the next step of their career.

In the subsequent analysis we will use this model as the basis for discussion. Through this model we want to identify the deviations from the ideals, and determine which of the perspectives gives a superior understanding of expatriation.

3 Methodology

This chapter presents our methodology. The method is dependent on our research questions, as they dictate what method is eligible (Johannesen, et al., 2011). This chapter will give an overview of what we have done, why we have done it, and explain the associated implication with regards to our choice of method. The chapter is completed with some ethical evaluation of the research.

3.1 Research Approach

To best understand the research question from the participants' perspective, we found a qualitative research approach suitable (Ticehurst & Veal, 2000), as we wanted personal experiences and viewpoints from our interviewees. Therefore, the nature of our task led us to use an *inductive approach*, with use of in-depth interviews to explore if successful expatriation is best understood using a cultural or pragmatic perspective.

3.1.1 Research Design

Our research question led us to use an *exploratory design*, as we sought new insights to the expatriation literature through a detailed explanation of the topic. We try to give an overview and create an understanding of expatriation, as it is a complex situation with imprecise problems. For this, an exploratory design is particularly useful. We presented our aim of the thesis twofold: we first seek to identify deviations from the recommendations for successful expatriation described in the expatriate literature. Secondly, we use the two perspectives, the cultural and the pragmatic, to see which of them better describes the deviations, and hence contributes to a superior understanding of successful expatriation.

When conducting exploratory research, we used a combination of research from the literature and interviews with an expert on the subject. For the expert opinion, we interviewed Andersen from ASC, who has many years of experience working with expatriates. We also conducted in-depth interviews with expatriates and HR representatives from Innovation Norway and ConocoPhillips. Given the nature of our topic we used an *intensive research approach*, including detailed knowledge on a few units. Given our restricted direct experience with the research topic and limited time, an intensive approach gives us details on multiple variables, enabling a more complex understanding of the context.

3.1.2 Research Strategy

This thesis is based on a *case study*, which is defined as “*a strategy for doing research which involves an empirical investigation of a particular contemporary phenomenon within its real life context using multiple sources of evidence*” (Robson, 2002, p. 178). We wanted to do a comparison to get a more comprehensive view on expatriation, hence we needed two companies. Multiple observations of the same phenomenon are called *multiple case studies*. This enables replication, as both cases independently can confirm any emerging constructs or propositions. The cases can also be used to reveal complementary aspects of expatriation, resulting in a more robust and generalizable theory (Santos & Eisenhardt, 2004). The drawback of using a case study is a limited number of respondents (Saunders, et al., 2009) but we considered that the strengths of this research strategy outweigh the drawbacks.

3.2 Research Objects

The choice of case companies is based on two criteria. Firstly, we wanted to focus on expatriates who have *been abroad on long-term IAs*, meaning that they have been abroad three to five years. The reason underpinning this criterion is that the expatriates have to be abroad for an extended period of time to truly interact and feel at ease in the host country. This will also mean that they may have adapted enough to their new cultural environment to experience a reverse culture shock upon return. The second criterion is to look at expatriates who had *returned to Norway within the last three to nine months*. This criterion gives us a certainty that the expatriates have done some readjustments, but that they still have a vivid memory of all their experiences and challenges abroad.

It is challenging to access this narrow scope of expatriates, as the number of Norwegian expatriates is low to begin with, even without our criteria. In addition, we are dependent on the companies and their expatriates to be willing to share routines and experiences with us. We started the process of finding potential case companies during the fall of 2012. By mid-January 2013 we had contacted 26 companies, see appendix 7.1. We chose to cooperate with Innovation Norway and ConocoPhillips as they are both currently working on improving their expatriation process. In addition, we cooperate with ASC who provides expatriate courses for both case companies. This will increase the reliability of the thesis, as it gives us first-hand information about cultural training before an IA, in addition to access a person with extensive knowledge on the topic.

In order to increase generalizability, we chose two case companies that are fundamentally different on several aspects, making them an interesting starting point for comparison. Firstly, the companies originate from different countries and are of a different size. ConocoPhillips is a large American company, whereas Innovation Norway is a smaller Norwegian company. There is also a difference in ownership structure and industry. ConocoPhillips is a privately owned company in the oil industry. Innovation Norway, on the other hand, is state owned and operates as a supportive means for Norwegian entrepreneurs in multiple industries. Both companies operate in many locations worldwide, and are dependent on expatriates as a part of their international strategy. Innovation Norway uses an ethnocentric approach, whereas ConocoPhillips uses a geocentric approach. As of today, the management of the expatriation process in both case companies is not sufficient to leverage the new knowledge and experience the expatriates have upon repatriation.

Our overall research strategy was to approach two multinational organizations with extensive experience of successful expatriation. In order to enhance generalizability we chose two companies that are different in terms of nationality, industry and in staffing strategies. Based on these differences we believe that Innovation Norway and ConocoPhillips are well suited for exploring our research questions. The difference in size, nationality and international staffing strategy suggest that the two companies manage their expatriates differently, making them interesting for a comparison. We believe that the two case companies in combination with ASC will reveal relevant characteristics and bring unique insight to highlight our research. In the following we will give a short introduction of the three companies.

3.2.1 Innovation Norway

Innovation Norway is a state owned enterprise, with the vision "*to give local ideas global opportunities*" and is currently the Norwegian government's main instrument for innovation and development of Norwegian enterprises and industry, both domestically and globally (Norwegian government, 2013). The company, as we know it today, is a result of a merger in 2004 between The Norwegian Tourist Board, The Norwegian Trade Council, The Norwegian Industrial and The Regional Development Fund, SND, and The Government Consultative office for Inventors, SVO (Norwegian government, 2013). Innovation Norway's headquarters are situated in Oslo, and they have about 700

employees spread out in all the Norwegian counties. Worldwide they are present in more than 30 countries (Visit Norway, 2013), where their operations are closely linked to Norwegian embassies and consulates (Innovation Norway, 2013).

By combining local industry knowledge and international networks with business ideas and motivation of entrepreneurs, new successful businesses can be created. Innovation Norway's core group of clients is Norwegian companies, predominantly small-medium enterprises. Their main focus areas are entrepreneurship, growth in businesses, and innovation environments (Innovation Norway, 2013). They provide advisory-, promotional-, financial-, and network services to enable Norwegian businesses to grow, become competitive, and enter new markets (Innovation Norway, 2013). In addition, Norway is marketed as a tourist destination worldwide (Innovation Norway, 2013).

International assignee policy

Innovation Norway recently started the process of changing their expatriation policy, and considers this thesis as a part of the change. So far they have focused on competence building in their use of expatriates. The expatriates can come internally or externally. In order to secure that, they access leaders and professionals with different backgrounds and international experience. To be considered for an IA in Innovation Norway, the candidate needs a solid knowledge of Norwegian business life. This requirement is necessary to lead any office abroad, due to Innovation Norway's international objectives and connection to Norway. If the candidate is recruited internally, the employee maintains employment within Innovation Norway after the IA. However, the candidate is not granted leave of absence from their ordinary position. External candidates are offered a temporary position, and are expected to return to business activities in other companies after the IA (Innovation Norway, 2013).

As of March 2013, Innovation Norway has approximately 40 Norwegians working abroad. The external expatriates sign a contract that last up to four years, whereas internal expatriates can stay abroad for maximum five years. The norm is that an expatriate cannot take on a new IA directly after completing an IA. However, the number of expatriates is generally stable, with three to six expatriates returning in an average year. Approximately one expatriate is considered as an expatriate failure each year, whereas around 10 percent of the expatriates end their IA before completion. With the relative cost of a normal employee of 250%, expatriation is expensive. Innovation

Norway has five to ten inbounds coming to Norway each year through an internship lasting a maximum of three months. In addition, they are introducing a trainee scheme for students lasting up to six months (Innovation Norway, 2013).

3.2.2 ConocoPhillips

ConocoPhillips is an American company that stems from the merger between Conoco and Phillips Petroleum Company, completed in August 2002. In 2006, ConocoPhillips acquired Burlington Resources, and today they are the third largest energy company in the United States. Through their mission, "*we exist to power civilization,*" ConocoPhillips have made a significant contribution to the energy industry due to pioneering spirits and innovation (ConocoPhillips, 2013).

Their headquarters are situated in Houston, and they employ more than 16.000 people spread throughout almost 30 countries. Their operations include worldwide exploration, production, transport and markets for multiple oil and gas products. They have a strong tradition for prioritizing safety, health, and environmental stewardship in their operations as an independent upstream company in the oil and gas industry (ConocoPhillips, 2013).

ConocoPhillips in Norway

ConocoPhillips is one of the largest international operators on the Norwegian continental shelf, employing approximately 1900 people in Norway. Their Norwegian headquarters are situated in Tananger, where they manage their operations in petroleum exploration and production on several Norwegian fields (ConocoPhillips Norge, 2013).

Individual Development Plan

All employees in ConocoPhillips have an Individual Development Plan, or IDP, which is used for setting career goals. It is also here where the employee expresses their desire for an IA when they are eligible. The IDP can be looked at as a curriculum to show the employee's plan both for long- and short term, and is an essential tool for the management in the selection process for an IA. When employees apply for an IA, the IDP will tell if there is an opportunity for development for the particular candidate, as well as learning opportunities for the candidate. The IDP is also used as a screening tool by the management to find the right candidate for a vacant position.

International Assignee Policy

ConocoPhillips focus on maintaining and develop the competence within the company (ConocoPhillips, 2013) and use IAs as a part of their internal development program. They use significantly more long-term than short-term IAs, where the criteria for long-term is a length of more than one year. Even though it is more of a norm than a rule, international experience is needed to get to the management level in ConocoPhillips.

As of April 2013, ConocoPhillips has 77 Norwegian expatriates currently abroad, with an average IA lasting from three to five years. The number of expatriates is relatively stable, but can vary with large projects. In an average year there are 10 to 15 expatriates returning, where the number of early returns and expatriate failure is close to zero. An expatriate costs approximately twice as much as a normal employee, making expatriation expensive. ConocoPhillips has an unwritten policy that the expatriates cannot be abroad for more than 10 years at a time, due to social security reasons. ConocoPhillips Norway also has 80 inbounds coming mainly from the USA and the UK (ConocoPhillips, 2013).

3.2.3 ASC

ASC is a Norwegian consultancy company specializing in IAs. They offer courses in both Norwegian and English for people working across cultures. ASC believe that the success of an IA is dependent on professional skills, the employee's ability to gain entry into new surroundings, and how well the family thrives. The courses use material based on research and practice with the aim of practical usage of the knowledge. The different courses combined cover the process of going abroad, the period abroad, and the return to one's home country. Their customer group includes many of the largest organizations in Norway, where they hold courses for expatriates and their families. They also offer courses to inbounds or companies interacting with international partners (ASC, 2013).

3.3 Data Collection

The nature of the thesis leads us to use a *qualitative method*, where the data collection is mainly in the form of words (Easterby-Smith, et al., 2012). To understand the complexity of expatriation, qualitative research with in-depth interviews and primary data was considered appropriate. *Primary data* is new and self-acquired (Saunders, et al., 2009), and enables control over the data collected and the sample structure. Because of this, we have a greater confidence that there will be a match between the data and the

objectives of the study (Easterby-Smith, et al., 2012). By using qualitative research, the focus is not only on what, where and how, but also why and how a phenomenon occurs.

3.3.1 Selection of Candidates

Our goal for the qualitative interviews was to gather comprehensive information about the expatriates' experiences and thoughts. As only a few expatriates satisfied our criteria, there was little room for random selection of candidates. We listed our criteria to the HR representatives, who then chose the interviewees for us. After receiving a list of the interviewee candidates, we contacted them to schedule time for the interview. This was done by giving them different dates and time options in a set week, and the interviewees could choose which time suited them best. We sent e-mails to confirm both the time and the locations as soon as we received the room bookings from HR.

Despite being selected by the HR representatives based on our criteria, not all of the expatriates in the two companies satisfied *both* of our narrow criteria. The problem with the first criterion of length of stay is that not all of our interviewees have spent at least three years abroad. The shortest stay lasted for only 17 months. However, we still consider the stay long enough to have experienced the majority of challenges one can expect to encounter on an IA. Having differences in the length of stay might allow us to see whether the time spent abroad also can affect the expatriation experience.

There were also some candidates who did not satisfy our second criterion of time since repatriation. One of our interviewees repatriated a year before the interview, whereas another repatriated only a month before the interview. The former candidate was on rotation, which is a different IA type than the rest of the interviewees had. As rotation is an alternative form of an IA, this makes the expatriate quite interesting to include in our research. The latter candidate was a last minute change after one of the original candidates had withdrawn from participation. However, this candidate had spent the longest coherent time abroad completing two different IAs, and has therefore gone through most of the Expatriation Cycle twice. In addition, one of the expatriates is still abroad, as the expatriate went directly to a new IA. We still consider this expatriate as a valuable source of information, as the person has been through all the different stages of the Expatriation Cycle leading up to repatriation on the first IA. This expatriate also has

the unique characteristic of being fairly new to the company, which might give a different view on the process compared to colleagues with longer company experience.

3.3.2 Interview guide

We chose to collect the data through *semi-structured interviews*, as there is room for flexibility in this type of interview (Easterby-Smith, et al., 2012; Saunders, et al., 2009). This is important as we are looking for subjective experiences from the expatriates. Using semi-structured interviews we increased the degree of confidentiality, which could give more personal answers from the interviewees (Easterby-Smith, et al., 2012). The structure of the interviews was addressed by use of an interview guide, Appendix 7.2-7.4. The interview guide made the interviews more predictable and increased the reliability, as the information is easier to reproduce (Lilledahl & Hegnes, 2000). It also ensures that the variations in responses are due to the interviewee and not the interview. We chose to build our interview guide on existing literature on expatriation to be able to detect deviations from the ideal described in the literature.

We made separate interview guides for HR, ASC, and the expatriates, as we wanted to get different information from them. We started the interview guide with open questions about the interviewee's background to get them to open up and share experiences with us. The aim was to get the interviewees to talk about the topics using their own viewpoints and knowledge. How we asked the questions varied slightly depending on the interview, and in some interviews the sequence of the questions also deviated slightly from the interview guide. Conducting the interviews on a semi-structured basis we were also able to react on the non-verbal responses from the interviewees, and developed secondary questions. Adding secondary questions helped us match the exploratory characteristic of our study. We also used *laddering*, where we tried to ask why-questions in order to reveal the interviewees' value base and to obtain illustrations and examples of events (Easterby-Smith, et al., 2012).

3.3.3 The Interviews

Firstly we interviewed the HR managers from Innovation Norway and ConocoPhillips in order to get an understanding of the companies' international policies and how they followed up the companies' expatriates. Secondly, we interviewed Andersen from ASC to get an understanding of what ASC offer in their courses. Furthermore, we interviewed eight expatriates; four from Innovation Norway and four from ConocoPhillips. The

interviews were conducted in the spring of 2013, at the case companies' headquarters in Oslo and Tananger. One hour was allocated for each of the interviews. There were only small deviations in length for the interviews with the expatriates, one of the HR representative interviews lasted for an hour and a half, whereas the interview with ASC lasted for nearly three hours. It is important to notice that the interview with ASC also included large parts of their repatriation course, giving us valuable insight in how courses are conducted.

As previously presented, our expatriate candidates were selected based on two criteria. We want to make them as anonymous as possible, therefore figure 4 below list the general characteristics of the group. The eight expatriates we interviewed were of different ages: seven are male and one is female. There are also differences in the positions the expatriates had on the IA and the family situation abroad. The expatriates were stationed abroad in China, Singapore, Poland, USA, South Africa, Indonesia, Russia, and Vietnam. We chose to anonymize which countries the expatriates were stationed, to better keep their anonymity. Instead we use the Human Development Index, HDI, to indicate the type of country they were stationed in. The HDI ranges from very high, high, medium, and low human development.

Company	Name	Age	Location(s)	Type of IA	Abroad for	Repatriated	Travelled with	Cultural training
Innovation Norway	IN 1	50-60	Very high HD	Expatriate manager	3 year, 3 months	October 2012	1st year: Alone 2nd year: Spouse 3rd year: Alone	No
	IN 2	50-60	1st IA: Medium HD 2nd IA: Very high HD	Expatriate manager	1st IA: 3 years, 6 months 2nd IA: current	On 2nd assignment	Spouse and two children	Yes
	IN 3	60 +	Medium HD	Expatriate manager	5 years, 4 months	December 2012	Spouse and two children	Yes
	IN 4	60+	Medium HD	Expatriate manager	3 years, 9 months	October 2012	Alone	No
Conoco Phillips	CP 1	20-30	Very high HD	Expatriate project	1 year, 6 months	June 2013	1st year: Alone, 2nd year: Spouse	No
	CP 2	30-40	1st IA: Very high HD 2nd IA: Medium HD	Expatriate manager	1st IA: 2 years, 6 months 2nd IA: 3 years, 7 months	February 2013	Spouse and two children	Yes
	CP 3	40-50	Very high HD	Expatriate project	2 years, 9 months	December 2012	Spouse and two children	Yes
	CP 4	40-50	High HD	Rotation	3 years, 7 months	March 2012	Alone	No

Figure 4: Interviewee Overview

We believe the variation in the sample can help us to look at our research questions from different viewpoints. We are aware that we have a small sample, which is a common trade-off of qualitative research to secure a deeper understanding (Neyer & Harzing, 2008). Our group of interviewees is rather homogenous regarding

demographic variables, however their experiences are different due to differences in position and host country.

We were both present at all interviews, and took turns on being the lead interviewer. This was done to secure that both of us had the same basis for understanding the interviews, as both experienced the unspoken clues that were given from the interviewees. Even though two interviewers can be more intimidating for an interviewee, it gave us an advantage when asking secondary questions. The person who was leading the interview kept on track with the interview guide, whereas the other person observed and asked secondary questions. Combined with using a tape recorder, this helps protect against interviewer bias.

The interviews were conducted in English, as the thesis is written in English. This was done in order to avoid loss of important information in the translation process, even though English is everyone's second language. There is a chance that the interviewee and we as interviewers consider different factors to be important, and we may have different meanings and interpretations to the events described by the interviewee (Neyer & Harzing, 2008). However, the working language in ConocoPhillips and to some extent Innovation Norway is English, and all interviewees demonstrated a high English proficiency level. In addition, if something was unclear, we allowed the interviewees to explain the phenomena in Norwegian. All the interviews were recorded and transcribed for further analysis.

3.4 Analysis and Presentation of Results

We conducted 751 minutes of interviews that were transcribed into 138 pages of data material. Thereafter we read all the transcripts to be familiar with the context, and to be able to reflect over the data. In Chapter 2.5 we presented our Expatriation Model, which we will use to analyze our findings. To do this, we sorted the data material into the three main subjects from the model; pre-departure and relocation, the operative stage, and repatriation. We further divided into subcategories, which will be used as the basis for our analysis. During this process it became obvious that some of the concepts were related to each other, and should therefore also be connected in the analysis. We were looking for common patterns in the data material, but as the two case companies differ in many aspects it is also important to highlight the differences. In addition, we took

notes on thoughts and ideas that occurred during the process so they would not get lost before the analysis started.

3.5 Evaluation of Results and Methodology

The strength of the qualitative approach is the overall view of the situation, allowing greater understanding of the social processes and contexts. Due to the proximity in the process of information collection, it might be easier to get a better understanding of the individual's views on the topics rather than through the use of quantitative methods. The downside of this aspect is that we can only concentrate on a few interviewees due to resources and the need to keep track of all the data. The weakness of the qualitative approach is obvious when it comes to selection of which interviewees to focus on. There is no guarantee that those who are selected in the selection process represent the average in society. To gain optimal results, it is therefore important to examine the research questions from several viewpoints (Holme & Solvang, 1996). To assess the rigor of the case study, the following criteria are commonly used: reliability, internal validity, construct validity, and external validity (Gibbert, et al., 2008).

3.5.1 Reliability

Reliability is the consistency in findings from ones data collection techniques or procedures of analysis (Saunders, et al., 2009). Due to transparency of the study approach, subsequent researchers will arrive at the same findings if the study is replicated (Gibbert, et al., 2008). Transparency in our research is addressed by thorough documentation and clarification of the steps in our research approach. According to Saunders et al. (2003) there are four threats to reliability: participant error, participation bias, observer error and observer bias.

Participant error refers to the setting where research is conducted, and that the setting may influence results (Saunders, et al., 2009). To overcome this error we emphasized the voluntary participation, where initial contact was done by the HR representatives in the respective companies. We only approached expatriates who had accepted to participate in our study. We conducted all our interviews face-to-face at the respective case companies' offices to increase the level of comfort and to create trust between us and the interviewees. However, one potential source of participant error may be due to interviews being conducted in English. Even though all interviewees have a high English proficiency level, there is the possibility that some of them would communicate more

freely in their native language, Norwegian. However, we find it unlikely that the language has caused considerable alterations of the results.

Participation bias can lead to participants sharing only parts of a story, often due to what they believe their managers want them to say (Saunders, et al., 2009). There is always a risk that the interviewees try to give a more flattering impression of the situation by avoiding potential negative aspects. To overcome this type of bias we have tried to keep our interviewees as anonymous as possible. We made sure to communicate the confidentiality of all recordings and transcripts. All the expatriates are given a new name consisting of the company initials and a random number, which are used throughout the thesis. With that said, the same is done with the HR representatives, even though the nature of their position in the company makes it easier to identify them. We also gave Andersen from ASC the possibility to remain anonymous. As Andersen participated in the interview process as an external expert on the topic of expatriation, the relation to the process did not entail any need for anonymity.

All quotes presented in our analysis are written exactly how they were said. However, in the interest of anonymity we changed all words that reveal the gender of the expatriate or the country of the IA. For instance, “abroad” is used instead of the name of the country, and “spouse” is used for any reference to a husband/wife. However, it should be noted that both HR and colleagues of the expatriates might be able to recognize specific episodes or personal viewpoints, and therefore be able to identify them.

Because of the voluntary and anonymous aspects of our interviews, we believe that our interviewees are able to give true versions of their situations and honest answers to our questions. We were able to get in contact with HR representatives and expatriates who were genuinely interested in the topic, all eager to contribute by telling their story. Both companies also recognize room for improvement in their expatriation management and hope that our research can contribute to increase the quality of their policies.

Observer error involves failure to capture the true meaning expressed by the participant (Saunders, et al., 2009). Both of us were conducting the interviews, leading to different ways of asking the questions. This observer error was minimized by use of the interview guide, which ensured some structure to the interviews, even though we allowed

ourselves to deviate from the sequence the questions were written in. In addition, the secondary questions can lead to observer errors, as we might have misinterpreted the meaning of the interviewees' story. There is also the danger of us asking secondary questions too quickly, as we could have interpreted a pause for recollection as finishing their answer. However, during the transcription of the first interview round we realized that we had a tendency for this type of observer error. Being observant to our own mistakes, we were able to reduce this type of error in the second round of interviews.

The last threat of reliability, *observer bias*, involves the observer interpreting the data in a certain way. As we had conducted the review of the literature to make the interview guide, there is the potential that we were affected by an observer bias when conducting the interviews. However, it would have been nearly impossible to conduct any sensible interviews without a theoretical understanding about the topic of expatriation. In addition, our background as business students with multiple courses involving expatriation could also affect our interpretation of the results (Johannesen, et al., 2011). The taping and transcribing reduced the observer bias. In addition, we discussed all the transcriptions among ourselves and with our thesis supervisor before we started the analysis to make sure that we had a common understanding of our data material.

Conducting qualitative research poses some challenges for reliability, as the consequence of qualitative data collection is the challenge of replicating the research (Johannesen, et al., 2011). We have kept the reliability in our literature review with a reference list, which can be verified by an outside party at any time. The literature will always be identical as it is written down and therefore not in constant change.

3.5.2 Validity

Validity concerns the degree to which one is measuring what one intends to measure. It is about interpretation of results and whether the results describe underlying reasons or what they are supposed to explain (Johannesen, et al., 2011). The term validity is imprecise, which means that it is impossible to achieve perfect validity in social studies. There is no exact way of testing validity, so to assess validity it is important to undertake systematic and critical discussions of the interview process, data collection, and the data with an emphasis on relevant types of validity (Grønmo, 2007). Reliability can be said to be a necessary - but not a sufficient - condition for validity (Gripsrud, et al., 2007).

Internal validity refers to the causal relationship between the result of a study and the variables used in the study. The aim is to provide a plausible causal argument to defend the conclusions of the research (Gibbert, et al., 2008). A key question is whether the results from our interviews are applicable for the respective case companies as a whole. By conducting semi-structured interviews, we have tried to maintain the internal validity. However, it can be questioned, as the number of expatriates interviewed was fairly low. Our inductive research strategy allowed us deeper understanding of the situation, but the group of expatriates is too small to represent the larger number of both previous and current expatriates. We should therefore be careful to generalize our findings, as they are likely to cover only parts of the truth.

Construct validity refers to whether one investigates what one claims to investigate and whether the research leads to an accurate observation of reality. With a case study, subjective judgment can be used instead of developing a well-considered set of measures (Gibbert, et al., 2008). To address the construct validity we have established a clear documentation in our methodology chapter of how we went from the research questions, through the analysis, and then to the final conclusions. This chapter gives an overview of how we have conducted our research, and how we have maintained objectivity through the literature review and interviews. In addition, we have sought to triangulate our research by looking at expatriation from different data sources (Gibbert, et al., 2008). We started by collecting data from the HR representatives before we collected data from the expatriates. As an additional complementary source, we collected data from ASC. All these sources of data had different perspectives on the topic of expatriation, allowing us to look at the phenomenon from different angles.

The three types of validity are dependent on each other. There is a need for a clear internal validity through a clear theoretical logic and construct validity with a link between theory and empirical observations before we can think of external validity. The internal- and constructive validity is therefore a condition for *external validity*, which refers to the generalization of the phenomena in other settings than they are studied. A multiple case study is not a sufficient foundation for generalizing, but it has been argued that case studies can be used as a starting point for theory development (Gibbert, et al., 2008). According to Saunders et al. (2009) the inductive approach is less concerned with the need to generalize as one is focusing on one specific context and looking at reasons

as to why a phenomenon occurs. If the phenomenon occurs other places the reasons behind it might not be the same, leaving less room for generalizing.

The qualitative method aims to capture what is special and unique with each interviewee, as the interviewee affect which data is important in the survey. The interviewees are credible because they express their own views on the subject, however, one can question the validity of the data compared with data from other interviewees (Holme & Solvang, 1996). The external validity is strengthened by the multiple case study. Interesting findings in one case can be compared to other cases for confirmation or rejection. Even though we have collected detailed data, we cannot generalize the findings based on the data alone.

3.6 Ethics

According to Easterby-Smith et al. (2012) research ethics is about appropriate choices and to act in a suitable way with regards to both parties. Through this process we have been aware of the ethical consequences, and tried to base our decisions in regards to them. We feel that we have not brought any harm to our research objects, as we have handled them in a discrete fashion. We have also kept their anonymity, as presented in Chapter 3.5.1, and never disclosed any confidential information.

We went into the interview process asking for honesty and openness. However, in some cases we left out comments from the interviewees to protect their privacy and anonymity. Some of the quotes might seem harsh on their own, as they are used to make a point. However, we have tried to explain in which setting they were told so that they would not be taken out of context. One of our interviewees wished to confirm the used quotes, so we sent all information containing this interviewee's opinions and statements before printing the thesis. Throughout the process we have acted in a humble and respectful manner, to both the companies and interviewees. We have thanked all the participants for taking the time to be interviewed, and promised to send them a copy of the thesis once it is finished to show our appreciation.

4 Analysis and Discussion

In this chapter we will use the Expatriation Model we built based on the literature review to analyze the data we collected from our interviewees from Innovation Norway and ConocoPhillips. It is important to notice that the following statements reflect the interviewees perceived experiences. The purpose is to detect any deviations from the ideal Expatriation Cycle, derived in Chapter 2. Each subchapter will be concluded with a company comparison. Here we aim to identify if the potential deviations are better described by the cultural or the pragmatic perspective, and hence which perspective contribute to a superior understanding of successful expatriation.

The starting point of our thesis is a clear need for improving the expatriate process in our case companies, in addition to improving and restructuring the process in a way that does not hinder individual adaptation. We will therefore conclude the chapter with some recommendations for improving the management of expatriation.

4.1 Stage 1: Pre-departure and Relocation

Firstly, we will go through Stage 1: Pre-departure and Relocation, which takes us through the process until the expatriates have arrived in the host country. In figure 5 below, we have highlighted the aspects we will focus on.

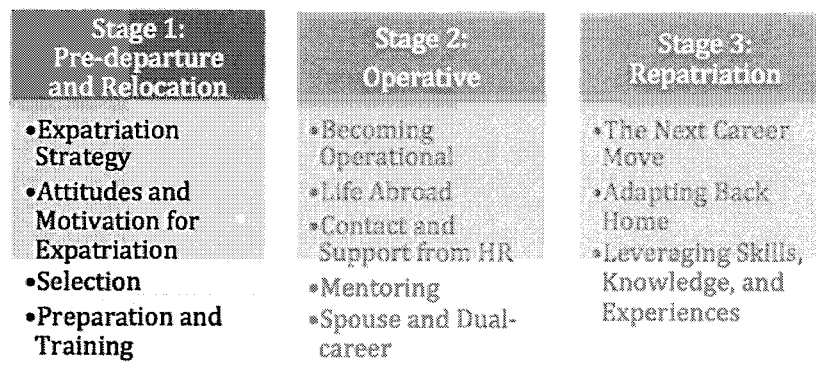


Figure 5: The Expatriation Model - Stage 1

4.1.1 Expatriation Strategy

The expatriate literature describes an ideal where both international staffing strategies and the strategic motives for using expatriates are connected to the goals and purpose of the IA to create success.

Innovation Norway

Innovation Norway use expatriation as their main source of staffing for IAs and apply an ethnocentric staffing approach. This combination is natural in relation to their state ownership and the nature of their operations:

*“The main thing is that they are dealing with Norwegian competence.
It can work without being Norwegian, but it is not so easy.”*

- HR IN about expatriation strategy

Innovation Norway's business foundation is to act as a supportive means for Norwegian businesses, as presented in Chapter 3.2.1. They also hire well-educated local staff, but it is problematic to replace the Norwegian expatriates due to their knowledge and connections to Norwegian businesses. When asking which international staffing motive Innovation Norway use, the HR representative answered:

“I would like to say all three. But the main purpose is to fill a position.”

- HR IN about expatriation strategy

Innovation Norway uses their expatriates as a bridge between the host country and the Norwegian market, which could be seen as supporting a cultural perspective. However, we argue that position filling supports a pragmatic perspective on expatriation, as the expatriates are mainly taking over where there is a lack of local talent. The usage of external expatriates highlights a short-term perspective on expatriation, as they are only hired for completing specific work tasks abroad, before they leave the company. A process the HR representative was fond of:

*“But the expat system is a very good system because of the temporarily agreement.
Because you know on which conditions you are employed, and you are abroad during
the period we have agreed for. ... They leave, we recruit a new one, and the circle will go.”*

- HR IN about expatriation strategy

To some extent we can see that this argument is reasonable. From a long-term strategic view, the company is left with all the cost of expatriation, without being able to utilize the benefits. However, as Innovation Norway act as a supportive means for Norwegian businesses, the external expatriates acquire international experience through Innovation Norway before they move on to other companies. We argue that the process for external expatriates can be seen as a training program, where Innovation Norway leaves it up to the other companies to leverage the skills and experiences gained abroad. This process enables Innovation Norway to access a larger number of potential candidates that offers unique competence within different industries.

The strategy causes the internal expatriates to lose out of some of the potential benefits compared to the management development strategy. We will however, argue that Innovation Norway uses management development much more than they acknowledge. Sending expatriates to management positions abroad will increase the skills and competencies of the expatriate. The problem is that expatriation is not linked as a part of a career path, leaving the internal expatriates without any career boost, which will be discussed in Chapter 4.3.1. By not utilizing their managers to a greater extent, Innovation Norway will also lose out of the organizational development benefits.

ConocoPhillips

ConocoPhillips use both expatriates and rotation to complete their IAs, through a geocentric staffing approach. Expatriates are only used if local talent is not available, which is a rather pragmatic view on expatriation. It also increases the pool of potential candidates, as ConocoPhillips can recruit from all their subsidiaries worldwide. However, we found that the HR representatives also experience the downsides of a centralized international staffing:

“When they are set they are set. We just had a revision of the policy, the new one have not come yet. We gave a lot of input, but we do not know if it is taken care of or taken into consideration. It can be difficult ...”

- HR CP about expatriation strategy

The Norwegian HR department has little impact on the global HR policies, making it difficult to adapt them to Norwegian standards. The HR representatives reported use of all three main motives for expatriation, but that they mainly see it as:

“... development of skills because they give the business something when they are going abroad.”

- HR CP about expatriation strategy

Our findings give us reason to believe that ConocoPhillips have a holistic view on their expatriation process, which could indicate that they will reap more long-term benefits from their expatriates. It is important to notice that international experience is a norm deciding who can proceed to a management career within the company. However, we did not find any signs of IAs being connected to the further career path, leading to potential loss of career advancement for the expatriates, as discussed in Chapter 4.3.1.

Company Comparison

While Innovation Norway uses an ethnocentric approach paired with position filling, ConocoPhillips use a geocentric approach and management development. The chosen strategies seem to be appropriate considering their different business purposes, confirming the ideals of the literature. Both case companies seem to support a pragmatic perspective as a foundation for their expatriation, as none of them reported on any cultural aspects in relation to their expatriation strategies. We will, however, argue that any relationships that are built as a part of an IA are valuable from a cultural perspective.

4.1.2 Attitudes and Motivation for Expatriation

Attitudes and motivation is connected to the selection process, and not described as a step of its own in the ideal Expatriation Cycle. We see it as an important aspect, and have chosen to include the topic as a subcategory in our Expatriation Model. Attitudes and motivations are especially important for IAs, as it involves a large commitment from the expatriates and their families.

Innovation Norway

The HR representative believed that attitude towards expatriation was generally positive in Innovation Norway:

"I think most people see it as a very positive skill to have. But it is not so easy to achieve. I think a lot of our employees think that 'it is not possible for me.'"

- HR IN about attitudes towards expatriation

We found that the interest for expatriation seemed to be present, but that a glass ceiling hangs over the willing candidates, as if they believe the positions are unattainable unless they are recommended or asked to apply. If this is true, Innovation Norway might lose potentially great candidates due to the unwelcoming attitude. The expatriates knew that their chances of climbing the corporate ladder were limited after taking on an IA, which we will come back to in Chapter 4.3.1. However, it did not seem to change their motivations. Before the IA, IN 4 was head of a district office in Norway, whereas the others had fairly high positions as well. With the knowledge of limited career acceleration upon repatriation, our findings indicate that the expatriates in Innovation Norway were driven by motivations supporting a cultural perspective, such as experiences and personal development:

"But what I wanted to do was to take a new challenge, because I felt I conducted this job on autopilot. And I wanted to develop. I wanted to have more experiences before I retired. I wanted to have something to think back on when I am sitting in a rocking chair."

- IN 4 about motivation

The expatriates seemed to have a general desire of going abroad, but they were waiting for the right opportunity:

"I always have been willing to move out. it appeared and I took it ... I just dived into it. You cannot be too scared, because then you will never do it."

- IN 2 about motivation

IN 2 showed that one have to jump at the opportunity if and when it appears. It should be mentioned that the average age is higher among the Innovation Norway interviewees, which might decrease problems with young children and dual careers. However, the drive and motivation did not seem to fade with age and experience.

ConocoPhillips

In ConocoPhillips, the HR representatives believed employees were reluctant to go abroad due to family issues and the working conditions in the home country, even though attitudes towards expatriation were generally positive among our interviewees. HR saw the youngest employees as most willing and adaptable, but for them the glass ceiling keeping them from applying seemed to be dual-careers:

"I think most people would like to go on an expat assignment to be honest. ... But to actually do it, to pull the trigger, that is a different story."

- CP 2 about attitudes towards expatriation

Many enter ConocoPhillips due to the international focus and greater prospects for an international career. Some might have a dream or intention of eventually take on an IA, but are waiting for the right opportunity to come along. According to the HR representatives, the main motivation to go abroad is:

"The experience. And also to build up more knowledge, so when they come back they have bigger career opportunities. Build networks."

- HR CP about motivation

This statement lead us to believe that most of the expatriates in ConocoPhillips have a desire for personal development and increasing their own experiences, which fits well with ConocoPhillips using expatriation for management development. However, there seems to be some sort of separation between our interviewees. CP 3 saw the IA as an experience, whereas CP 1 had an internal need for development:

"You are expanding your life in a way, meeting new people ... I would say the main thing is the people. And expanding your horizon compared to what happens in Norway."

- CP 1 about motivation

The personal development and the experience abroad did not seem to appeal as much to CP 2 and CP 4, who indicated the salary and position as their main motivations:

"Not sure if I had very strong motivations. Just applying for a job I thought would be interesting. I did not quite imagine I would get the job. It was a much higher job in terms of salary than I was ever in. Much more senior type of job, with much higher and longer experience requirements than I had to offer at the time. ... I guess the motivation was to try something new."

- CP 2 about motivation

In the long run we believe that CP 2 was motivated by the potential career development. CP 4 also had a similar motivation, supporting a more pragmatic perspective. Our findings show that even though the attitudes were generally similar among the expatriates in ConocoPhillips, the motivations for applying to an IA were quite different.

Company Comparison

We found that attitudes towards expatriation were rather positive, even though there is evidence of a glass ceiling hindering the expatriates to take the leap in both companies. We found that the expatriates in Innovation Norway were mostly motivated by cultural aspects such as self-development and new challenges, as opposed to the pragmatic aspects such as the monetary motivation and career development we found evidence of among the interviewees in ConocoPhillips. Whether our findings include appropriate motivations or not, are not for us to decide. However, it is interesting that regardless of the motivational factor, the expatriates took the leap and applied for the IA, showing high levels of loyalty to their companies.

4.1.3 Selection

In an ideal selection process one find the right candidate with the proper technical skills and experience for completing the IA. Some scholars also argue that "softer skills" like CQ, language skills, and international adaptability should be considered.

Innovation Norway

There are two ways of organizing the recruitment process in Innovation Norway as they either do it themselves, or an external recruitment company does it for them. Vacant positions are announced with the objective of finding a competent candidate, external or internal, with the right management skills, relevant experience, network, and knowledge about the specific Norwegian industries they will work closely with on the IA. The

selection process focuses on management skills, with no consideration of cultural skills or any “softer” skills in general. Regardless of where the candidate comes from, the selection process should always follow protocol:

“I can talk to them about it, and they might do it with their own managers ... But you have to be a part of the process anyhow. We do not give it to anyone. No, no, absolutely not. Even though we think that this would be perfect, we finish the process. ... We never do exceptions.”

- HR IN about the selection process

Even with vacant positions abroad and an urgent need for a new expatriate, the HR representative pointed to the importance of following the formalities of the recruitment process, guaranteeing a set standard of the process. The number of applicants is not particularly high, making the selection process rather artificial for internal applicants:

“You must remember that when we internally recruit people then you should be a little bit careful on how you do the selection process. ... You know the person very well. And of course, I knew the person sitting on the opposite side, very well.”

- IN 1 about the selection process

Innovation Norway often knows the competence and experience level of their internal applicants, and some even knew their interviewer personally. All the interviewees applied for their IAs, and despite the firm statement from HR about no exceptions from the formal selection process, our findings included expatriates who got their offer without the formal interview process. Regardless, the HR representative also highlighted the family in the selection process:

“We are also quite eager to look into their family situation. Because we know that if their family are not adapting, then it would never be a success.”

- HR IN about the selection process

Even though the expatriates have the skills and knowledge to perform regardless of their family, the situation is often different when considering performance abroad in new and unfamiliar environments. Taking on an IA can be life changing:

“It is a joint decision when you are going to such an assignment.”

- IN 3 about the selection process

They are moving abroad for an extended period of time, making the spouses' opinion quite valuable. We found that the other expatriates from Innovation Norway shared this opinion, highlighting how important the family is when deciding to take on an IA.

Innovation Norway does not have any HR systems to accommodate dual-career couples, as they have a low number of expatriates, and the even lower number of dual-career

couples where both partners work for the company. However, in our small sample we found that IN 3 was a part of a dual-career couple, which will be discussed in Chapter 4.2.5. Our findings also show that the children were given attention to in the selection process, as an IA will greatly impact their life and education:

"No, we knew it a little bit before that I got the offer. But I did not accept the offer before we actually had a school for the children, and that was very difficult."

- IN 2 about the selection process

Moving abroad is a major decision in the expatriates' life, and with children it can be even more stressful. To accommodate the children many of the expatriates adjusted their relocation to the start of the school year.

ConocoPhillips

Our findings indicate that ConocoPhillips base a great deal of their recruitment on the IDP, presented in Chapter 3.2.2. It acts as a screening tool for potential candidates, and can help ease the selection process. Knowing who is eligible and willing to take on an IA can also help increase the benefits of using expatriation. We found a greater emphasis on technical skills, whereas little attention was given to cultural aspects and "softer" skills. This can be connected to the technical nature of ConocoPhillips' operations, where many expatriates are working on projects abroad.

Employees in ConocoPhillips discuss their future in their yearly performance appraisal, where the IDP is actively used as a tool for planning their future career path. Whereas the HR department sets the selection criteria, it seems like managers are highly involved in choosing or recommending candidates for IAs. This might be explained by the geocentric staffing strategy, where candidates are hired based on the appropriate skills for the position. The HR representatives reported that candidates actively apply for positions abroad or at least voiced their desire to take on an IA. However, our findings show that it was only CP 2 of the interviewees from ConocoPhillips who applied for the positions abroad. The expatriate had support from a key manager in Norway, indicating that recommendation from managers and peers play a huge role in the selection process.

The IDP acts as a connection between the individual employees' desires and the overall international strategy. Enabling this connection makes it easier for ConocoPhillips to use their IA as a management development strategy, increasing the competence and

experience of their employees. A good example of managers' involvement in the selection process and the employees' desires can be seen in the following:

"I was in the graduate program, and you move from different rotations. ... one of the managers wanted to keep me. ... I think he said, 'What can we do to convince you? I said: 'if you send me abroad, I will stay.' So that is how it happened for me, because usually people with my experience would never get to go abroad this early."

- CP 1 about the selection process

CP 1 would probably not have been given the possibility to go abroad through a formal selection process, as the expatriate was young and lacked experience. Giving such an opportunity early in a career, shows that ConocoPhillips is willing to invest in their employees. In addition, it might create loyalty towards ConocoPhillips, making the candidate an important employee for years to come.

We found that ConocoPhillips have flexibility in their recruitment policy to accommodate dual-career couples. Even though there is no formal HR system, the company's sheer size and high number of expatriates makes it easier to adapt to dual-career couples on an ad-hoc basis. From our sample, both CP 2 and CP 3 went abroad as a part of a dual-career couple. In the selection process, it was the partners who were considered for an IA that sat the criteria that their partner also should get a position abroad. For CP 3, the spouse was already assigned for a project abroad so ConocoPhillips arranged for a position for CP 3 on the same project. We will elaborate the story about CP 2's spouse in Chapter 4.2.5. What is important in relation to the selection process is that we found that the expatriates are not afraid of setting demands towards their company when negotiating their IAs, confirming that dual-career couples have higher demands for HR.

We believe that the expatriates would not have taken the IA if their spouses were not included, even though it would mean loss of valuable international experience for the expatriate, and loss of best candidate for ConocoPhillips. However, it is important to keep in mind that these higher demands were possible as both the spouses already worked for ConocoPhillips, whereas the situation could be different if the spouses came from other companies.

Company Comparison

In the selection process, both case companies highlighted the importance of finding the right candidate based on skills and experience, in line with the ideals from the literature. However, neither of the case companies considers cultural aspects, indicating a deviation from the ideal. From a cultural perspective the selection process should ideally include CQ, language skills, and international adaptability as a criterion, as these aspects are important for achieving international success.

While the HR representative from Innovation Norway reported a formal selection process, our findings indicated deviations from the ideal. It can be discussed whether or not this is a deviation from the expatriate literature, as long as it leads to the best candidate being selected. Ideally, Innovation Norway should hire internal candidates to be more confident of their competence and loyalty to the company. ConocoPhillips on the other hand allows more informal selection processes. As they hire internal candidates for their IAs, they should be more certain that the candidates would act in the best interest of the company.

With a low number of applicants, we found that Innovation Norway had problems filling vacant positions abroad. Some expatriates reported that they were asked to prolong their stay until a replacement was ready, confirming this suspicion. Prolonging the selection process over time might negatively affect the experiences for the current expatriates, and one can question the efficiency of the process. It can also affect the repatriation process for the returning expatriates, which will be discussed in Chapter 4.3.1. With position filling as their main expatriate staffing strategy, we question the act of balancing urgent business needs with strict selection criterion. In a small company, the recruiter will most likely have a good basis to consider the internal candidates performance without the formalities, hence shortening the selection process. On the other hand, it can be wise to use external recruitment to get an objective evaluation of the candidate, to secure that they do in fact have the necessary skills for the IA.

The IDP is a great tool in the selection process, helping ConocoPhillips to attain a tighter connection between the skills of their expatriates and the goals of the IAs. With the IDP as a base, ConocoPhillips is able to use their IAs as managerial development, where they also give opportunities to rising stars. Even though sending out rather new employees

might be in conflict with the geocentric strategy of selecting the best candidate, it shows that ConocoPhillips have a long-term view on the selection process.

Including the family in the selection process is a difficult process for both case companies. Our findings show that neither of the case companies includes family in the selection process, a deviation from the ideal where the family also should be considered. From a pragmatic perspective, a family will cost more in form of resources, whereas families indicates more people who have to adapt to life abroad from a cultural perspective.

4.1.4 Preparation and Training

The expatriate literature highlights an ideal where preparation and training is connected to both the purpose of the IAs, and the expatriates skills and experience. Ideally the expatriates have both technical- and cultural training before they move abroad. Some also argue that language courses should be a part of the training, and that the families should be included. The pre-assignment trip is highlighted as useful for arranging the living situation, schooling for the children, along with creating realistic expectations. Receiving HR support in the relocation process and additional training once the expatriates are abroad should conclude this step.

Innovation Norway

In Innovation Norway, the preparations start with a meeting with the expatriate, and preferably also the spouse. Here, information about practicalities and the expatriate policies are given. We did not find evidence of the expatriates receiving technical training in relation to their management skills. This can be related to the selection process, which ensures that the candidates have the right skills for the IA. Typically, the expatriates have a few months to prepare before departure, where they are expected to stay at least one week at headquarters to build up a network and prepare for the IA. This indicates a larger need for preparation and training for the expatriates with little experience within Innovation Norway, due to a lack of an initial internal network. IN 1, who had many years of work experience within the company, confirmed our suspicions:

“No, no. The preparation and training is probably something you go through if you are coming from external companies. But, internally I do not think it is too much of it.”

- IN 1 about preparation and training

This quote might make the reader believe that IN 1 assumed all training was unnecessary. However, IN 1 pointed out the internal recruited expatriates should not need additional technical training to perform well at the IA. The reader will be given a greater understanding of the basis for this opinion in Chapter 4.2.1. Regardless of work experience within Innovation Norway, all our interviewees pointed to a lack of preparation and training on how to relate to the Norwegian embassy:

"... I thought that I knew everything about Innovation Norway. What I was not very familiar with was the agreement between the minister of foreign affairs and our minister. And how to act as part of the embassy. That was, not a shock, but a lot of things disturbing. ... Should I act as an Innovation Norway person or should I act as a person from commercial counsel in the embassy?"

- IN 4 about preparation and training

As presented in Chapter 3.2.1, the expatriates from Innovation Norway have at least two roles abroad. Their role within Innovation Norway is to manage the office abroad, but the nature of the close relation to the embassy makes them a part of the Norwegian embassy as well. Some expatriates have the additional responsibility of being a regional manager. We found that the expatriates were insecure on how to behave correctly, and what aspects they should take into consideration with regards to the embassy.

The mentality of going abroad is important for preparation, and is a large part of the cultural courses provided by ASC. Both IN 2 and IN 3 attended ASC's culture course:

"We actually went to one of these courses, which are very useful. You get all kind off, not particular for the country you go to, but you get kind of practical information about everything actually. All the procedures, all the obstacles, all the challenges and so on. So it is quite useful."

- IN 3 about preparation and training

Whereas IN 3 had been stationed in the host country previously, for IN 2, this course brought the family the first understanding of the host country and its culture. However, IN 2 did not feel the course was adequate, as relevant questions about the family situation abroad were not answered accurately. We will come back to the effect of the cultural course in Chapter 4.2.2.

The expatriates only reported on English language skills that were relevant for their IAs. Even though the HR representative recognizes the importance of language skills in non-English speaking countries, Innovation Norway do not provide language lessons for their expatriates. With regards to learning a new language, the cost versus benefits did not measure up for the expatriates. They reported on local employees who spoke

English, or the use of interpreters. IN 4 did however, start out with the intention of learning the host country language:

"That was my plan, but I gave up. ... In my opinion it was a waste of time, waste of resources.

So I had to make a thought prioritizing, but the plan was of course to learn some ..."

- IN 4 about preparation and training

A valuable part of the context is that IN 4 quit due to health issues that made language training negligible. In addition to the stay at headquarters, Innovation Norway provides the expatriates with a pre-assignment trip to the host country. Here, the expatriates and their spouses visit the new location with the aim of searching for a home and schooling for the children.

As Innovation Norway is organized with HR centralized in Norway, they operate from the home country with little or limited knowledge of the local conditions. The pre-assignment trip should have sorted out the living situation, if not, the expatriates are placed in temporary living arrangements. HR also offers support in moving the expatriates and all their belongings abroad.

ConocoPhillips

We found a lot of formal preparations in ConocoPhillips, where HR in the home country cooperates with HR in the host country on the process of arranging visas and work permits. The expatriates and their spouses are given information on a meeting with HR in the home country, in addition to a mandatory medical check. To ensure that the families are mentally prepared, and that the family dynamics will survive the strains of an IA, they partake in a session with a psychologist. The psychologist does not perform any profound testing, and CP 3 described the meeting as drinking tea with a friend.

The IDP contains information about their employees, and will reveal any need for technical training before an IA. To prepare the expatriates for life abroad, ConocoPhillips provide cultural courses from ASC. Only CP 2 and CP 3 attended the course:

"No, I mean. You can read a lot, but you have to experience. You cannot prepare for everything."

- CP 3 about preparation and training

Both expatriates and their families liked the course, however, CP 3 saw that a course could not prepare for real life experiences. The course is not made to give the

expatriates a deep understanding of life abroad, but rather to build realistic expectations. The expatriates who did not attend were unsure if they missed out because of it:

"It is hard to say when you did not have it, but, I see that there are very different cultures, but you should just have a general prospect and come in with an open mind. That is sort of a general rule."
- CP 4 about preparation and training

None of the expatriates reported struggling with any major cultural problems, only minor pragmatic issues. We will elaborate on the effects of the course in Chapter 4.2.2.

The interviewees in ConocoPhillips had sufficiently high English proficiency levels, and were provided with interpreters when the local staffs were lacking language proficiency. The HR representatives reported that ConocoPhillips give their expatriates up to 100 hours with language training. CP 4 was the only expatriate that started language training, and were given unlimited hours of training. Being on rotation, life did not turn out as CP 4 had expected, causing the expatriate to give up due to limited resources. As CP 2's children were young and had never communicated in another language before, so ConocoPhillips arranged for them to get basic language training as well:

"The kids had a little bit of English training, but they were so young, so it was just one, two, three, four, five, red, blue, yellow, green, and that stuff. Ten hours or something."
- CP 2 about preparation and training

This finding shows that ConocoPhillips acted proactively before sending small children to international schools. Even though the number of hours was limited, they gave the children a few basic words, which could have boosted their confidence abroad.

The time between selection and relocation greatly impacts the pre-assignment trip. The expatriates who were assigned to a project seemed to have a much shorter timeframe than the others, hence little time for a pre-assignment trip:

"I had one quick trip in June, which was something I requested. ... I needed to come there and sort of calibrate my own understanding. It was very interesting, but I was not scared off. Then 2 months later my assignment started."
- CP 4 about preparation and training

The pre-assignment trip helped CP 4 make some sense of the host country, where the expatriate was going to live in on and off for the next few years on rotation. CP 2 and the spouse also benefitted from the trip for the first IA, even though they were stressing with many preparations and a limited timeframe. When CP 2 was going on the pre-assignment trip for the second IA, things did not look as bright:

"I remember when we went on the pre-assignment trip my spouse was crying in the hotel room at night. 'What the hell have we done?'"

- CP 2 about preparation and training

It should be noticed that CP 2 and the family had a really good time on the first IA, which might have made the transition to the new host country harder. However, this finding shows that it might not be easy to encounter one's new home for several years, especially if one is used to a high standard of living and a familiar cultural environment. How the change of environment played out will be elaborated on in Chapter 4.2.2.

ConocoPhillips has a decentralized HR structure, which allows them to benefit from the local knowledge in their HR departments, in addition to receive moving assistance from Houston. The HR representative reported on room for improvement on the communication between HR in the home and host country, while the expatriates were pleased with the assistance they got from both HR divisions.

Company Comparison

The case companies have some similarities in their preparation and training, and both were to some extent able to adapt the process to the different type of IAs. Where ConocoPhillips' preparation involves many formalities, Innovation Norway is more informal and only provides a formal meeting and a stay at headquarters as a part of the preparation. ConocoPhillips' decentralized HR division might explain this, hence indicating a greater need for coordination.

In Innovation Norway we found a need for more extensive preparation and training for the expatriates with little experience within Innovation Norway. We also found a lack of preparation on how to handle the relation towards the embassy, indicating a deviation from an ideal preparation process where the expatriates are prepared for all the different aspects of the IA. The relation to the embassy could be seen as a practical matter, indicating that the deviation is originated from a pragmatic perspective. ConocoPhillips on the other hand have the IDP designed to fill any training needs, which might be the reason why we did not find any deviations.

We found that both companies prepare their expatriates through culture courses provided by ASC, and neither has made the cultural training mandatory. The course is designed to prepare the expatriates for life as an expatriate and give realistic

expectations of life abroad, indicating that the course fulfills at least one of the objectives for cultural training highlighted in the literature. However, only half of our interviewees attended the cultural training, indicating a deviation from a cultural perspective. Even with the cultural training, the expatriates still have a lot more to learn. The course tries to find the intersection between how much time the expatriates have and how much they can learn at one point, indicating that it can only be used as a starting point when interacting with different cultures.

We found that both case companies offer a pre-assignment trip in line with the ideals in the literature. Most of the expatriates sorted out the living situation on this trip, while the others at least started the process. The deviation was found in ConocoPhillips, where two of the expatriates left quickly after accepting their IAs, leaving no time for a trip. As the expatriates did not report on any cultural issues, the pre-assignment trip can be seen as a valuable tool from a pragmatic perspective, as it allows them to sort out practicalities before moving abroad.

Our findings show that Innovation Norway has their HR division centralized in Norway, while ConocoPhillips have the benefits of local knowledge due to a decentralized HR structure. While Innovation Norway lacks local knowledge in each host country, ConocoPhillips struggles with communication between the HR divisions, which could lead to problems with coordination, and ultimately make it unclear with respect to which HR division is responsible for helping the expatriates. Both case companies provided practical support for the expatriates in the relocation phase in line with the literature. Whereas Innovation Norway focused on the major aspects such as moving the expatriates and their belongings abroad, ConocoPhillips provided additional support with practicalities in the host country.

None of the case companies reported on any additional training while the expatriates were abroad, which is another deviation from the recommendations in the literature. However, we question if it would have any significant effect, as the expatriates are able to manage quite successfully without it.

4.2 Stage 2: Operative

The second stage in our Expatriate Model involves the period the expatriates spend abroad. The literature recommends contact and support from HR, in addition to mentoring, whereas our Expatriate Model includes more detailed steps in this stage to highlight aspects we believe are just as important to attain a successful IA.

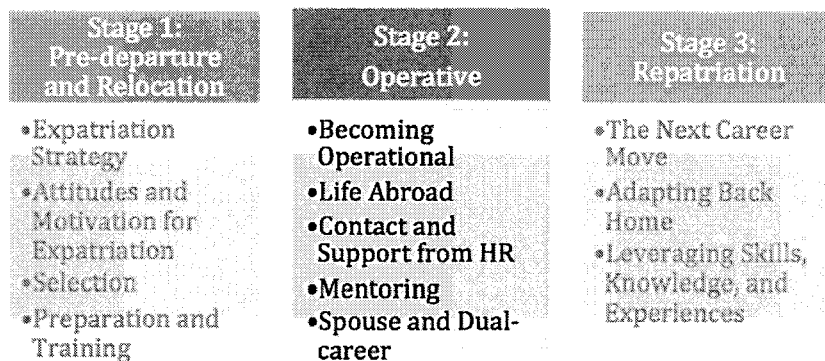


Figure 6: The Expatriation Model - Stage 2

4.2.1 Becoming Operational

The goal of preparation and training is that the expatriates should become operational on their IAs. The expatriates and their families are also starting their new lives abroad, and in the process of adapting to the new environment, encounters with culture shock are highlighted in the literature.

Innovation Norway

The view on when the expatriates should become operational is quite divided among the interviewees from Innovation Norway. Even though we did not focus on specific work tasks in the interviews, this was a factor of high importance for the expatriates. The interest for the subject is related to the management position abroad, where the expatriates were in charge of an office. IN 1 believed that with proper preparation one should be operative from day one:

"If you have really been here for 10-12 years ... then you know more or less what to do and not to do. ... We should set conditions that if you are going abroad, recruited internally, you are expected, or you should be able to do more or less a good job from day one."

- IN 1 about becoming operational

IN 1 was internally recruited with many years of experience within Innovation Norway, and claimed to be operative immediately after arrival. Without reporting any cultural problems, this statement was aimed at internal expatriates, as IN 1 did not have such

strong opinions with regards to external expatriates. Compared to the other interviewees, IN 1 knew the office in the host country, and had initiated contact before moving. IN 2 did not share this view, expressing how difficult it was to become operational abroad:

*"I did not understand how I could fulfill the experience. ... I did not know how to run an office to put it that way, because running an office abroad is completely different."
- IN 2 about becoming operational*

IN 2 struggled with the administrative tasks of running an office abroad, which can be related to the short period IN 2 had been working in Innovation Norway before the IA. IN 2 felt operative after a year on the first IA, indicating a much longer starting phase than the other expatriates and confirming our suspicions from Chapter 4.1.4, about candidates with little experience within Innovation Norway needing more preparation and training. The transition to the second IA was a different story:

*"It was beautiful. It was so easy. ... I think that is to some extent proving that since I have been abroad I know about running an office, I know what budgeting is about. ... I know about the Innovation Norway role related to the embassy ... So it was a world apart."
- IN 2 about becoming operational*

It should be noticed that the first IA was in a host country that is very different from the home country, which might have made the transition to a more similar country easier. However, the expatriate did not focus on cultural struggles abroad, but rather highlighted the pragmatic aspects of running an office. These findings indicate that preparations does not come from the preparations and training before the IA, but also from the work experience within the company. This is based on the finding that the expatriates with more experience within Innovation Norway did not express the same lack of preparations. The only aspect the other expatriates reported on was the relation to the embassy, as presented in Chapter 4.1.4.

Moving abroad for an extended period of time, the expatriates and their families also needs to settle down and start their new lives abroad. The process of adapting to the new environment might entail encounters with culture shock, starting with feelings of euphoria and excitement in the honeymoon stage. Our findings show that IN 3 and the family felt at home right away, likely since it was IN 3's second IA to the host country. The family also bought a house, which was ready for them upon arrival just in time for the international school start. For IN 4, arriving in the host country was like fulfilling a

lifelong dream, as IN 4 always had a special interest in the region's culture. The rise in spirits that IN 4 experienced in the beginning of the IA can be seen as a honeymoon stage from the Culture Shock Model. We argue that this was in fact a cultural reaction, as it was the cultural environments and people causing the feeling of euphoria.

IN 2 arrived in a country with the largest differences from the home country. At first the children were scared of the streets, and did not like their new environment. However, we question whether our findings portrait the beginning of a culture shock, or if it is a natural reaction to the new environments. We will elaborate on how this played out in Chapter 4.2.2.

ConocoPhillips

Most of the expatriates from ConocoPhillips had technical IAs, indicating that they should be prepared for their specific tasks based on their engineering competence. Since our interviews did not include task specific difficulties it was not an issue the expatriates in ConocoPhillips chose to highlight. The following statement can best describe their general attitudes about the level of preparation:

*"You sort of dived in and just took all the problems as they came."
- CP 4 about becoming operational*

The statement shows a rather pragmatic perspective, solving problems if and when they occurred. The technicality of their work tasks seemed to ease the situation, however, CP 2 who was a manager abroad described the experience like this:

*"You always have to adjust to your environment. Same here, you change between departments.
... Everything is different, completely different. ... You automatically get respect as a manager.
If you behave well and you treat your people well, you can do miracles."
- CP 2 about becoming operational*

CP 2 reported openness and adaptability in the management style, which are great clues of cognitive CQ. The reader might believe that CP 2 is supporting a cultural perspective, but behaving well and treating people nicely is a part of Norwegian culture, and hence also be present from the pragmatic perspective. However, as CP 2 recognized that the management style must be adjusted to the environment, we argue that CP 2 behaved in an appropriate manner from both perspectives.

Overall, the expatriates did not report on any specific start up challenges related to their work, and focused more on personal experiences related to their new environments. We found that some of them reported initial feelings of euphoria and excitement:

"In the beginning you feel like you are on holiday ... and then your normal life begins."

- CP 3 about becoming operational

Even though CP 3 showed signs of an initial honeymoon stage, the stress of not settling down and get organized in the new home were putting a restrain on the expatriate, especially with two children. CP 2 also travelled with children and had high expectations of a tropical climate and a good quality of life. Even though the family indulged in luxury perks, they encountered a lot of stress upon arrival, as the living arrangement was not settled. CP 1 on the other hand, arrived alone and started working almost immediately, leaving little room for adjustment. For CP 4 the dream of a sweet life working rotation did not turn out like the expatriate had imagined. Despite reporting a dream of working in the specific country, the reality of working in a small, isolated city did not match the expectations. Again our findings lead us to question whether we have evidence of a honeymoon stage, or normal reactions to the host countries.

Company Comparison

The main differences on the initial operational levels are related to the purpose of the IAs. We found a deviation in Innovation Norway, as none of the expatriates were prepared for the relations towards the embassy. In addition, we argue that IN 2 becoming operative after a year indicates a need for more preparation for less experienced employees and external expatriates. This can also be seen as a deviation from the recommendations in the literature, as the expatriate was not prepared for the technical aspects of the IA. However, acting as a manager abroad we argue that it is natural to have a longer startup period to figure out how one's management style function abroad.

Overall, our findings show that the expatriates managed well once the pragmatic aspects were sorted out, indicating that the pragmatic sides of expatriation need to be in place for successful expatriation. We could argue that the initial experiences were related to the honeymoon stage. However, we believe that the reactions were of a more pragmatic nature, indicating a deviation from the ideal from a cultural perspective. Even though the cultural perspective highlight that all people experience culture shock to a certain

extent, we argue that our findings are related to the change of environments and not the new cultures. It should be noticed that less cultural distance could have helped ease the situation in some cases, but even the expatriates with large cultural distances managed well abroad. As we have not measured the CQ levels of the expatriates, we cannot elaborate if this is related to any initial high levels of CQ.

4.2.2 Life Abroad

After the initial adjustments, life abroad needs to be meaningful while the expatriates and their families complete the IAs. The expatriate literature highlights pragmatic aspects such as a house, the position, and schooling for the children. In addition, cultural adaption is argued to be of great influence for the success of the IA.

Innovation Norway

With the living situation sorted out, IN 1 had a good outlook on life abroad, stating that:

*“... my view on it is that you should really look on similarities.
And usually you find 90% of the same. So, the 10% you can live with.”*

- IN 1 about life abroad

The ten percent IN 1 talked about were bureaucratic differences, and were solved quite quickly. IN 1 did not report any problems other than language, which was solved by the use of interpreters. According to IN 1, the expatriate did not encounter problems due to flexibility in behavior towards the new environment. This flexibility might indicate CQ, as one need to be flexible to adapt to the new environment. With that said, flexibility is not the same as adaptability and CQ. Flexibility refers to changing ones behavior, not necessarily entailing that one change to an appropriate behavior, which is the basis of adaptability. IN 1 was very dedicated to the IA, and socialized mostly with people from the embassy and a few local friends. As the expatriate did not report on any cultural challenges, and solved issues rather pragmatically, we argue that IN 1 did not go through the different stages of the culture shock model and did not encounter a culture shock.

IN 2 and the family had a rougher start, and encountered unfamiliar food and extreme heat. Even though this adjustment might imitate the movement down the graph in the irritation and hostility stage of culture shock, we argue that the family did not encounter any culture shock in the true essence of the term. Their struggles were due to pragmatic aspects, and not the culture in the host country. Even though IN 2 stated that the children lost their frames of reference in the new environment, we argue that this was

greatly caused by the lack of English proficiency levels and not that they were unable to acquire new friends abroad. Avoiding culture shock does not necessarily mean that they were able to adapt to the culture in the host country:

"No, actually not. How do you adapt into? ... You are just floating. One reason of course is that you do not have the language. ... Because you are not able to communicate."

- IN 2 about life abroad

Despite being in a country with a large cultural gap from the home country, IN 2 and the family managed to build a meaningful life abroad. The school was a safe place for the children, where they had a lot of friends and spent most of the day. The spouse was also occupied abroad, as we elaborate to in Chapter 4.2.5.

IN 3 felt like home again, and did not report on any signs of culture shock. When we asked how long time it took to fully adjust to the host country, IN 3 said it only took a couple of weeks the second time, while it took a couple of months the first IA. Interaction with the locals was also good, and the children gained a lot of friends at the international school. We did not measure the CQ level of the expatriates, however, we believe that this finding indicates that IN 3 had developed a higher level of CQ. We had similar findings on IN 4, who despite living alone, lived a comfortable life with luxury perks. IN 4 engaged with a large group of local friends, indicating motivational CQ, and spent the weekends hiking in the mountains. The spouse stayed in Norway due to family issues, however:

*"In fact, we spent one week together each month ...
I have never spent so much time with my spouse!"*

- IN 4 about life abroad

The combination of the spouse's travels, and meetings in Norway, the couple had opportunities to spend valuable time together. IN 4 also spent a few months in Norway due to health issues, early on the IA. The expatriate did not report any issues that can be related to culture shock. On the contrary, the expatriate thrived in the host country, and we believe IN 4 was able to keep the initial excitement throughout most of the IA. This is a clear deviation from the movements in the Culture Shock Model.

ConocoPhillips

Even though CP 1 went abroad quickly and had little time for preparations and training, CP 1 only reported on smaller initial cultural problems at work:

"Guess the first culture shock I had was at work. Just how you present yourself, and maybe the way people behave. ... but you learn something along the way."

- CP 1 about life abroad

This finding is the only one that might indicate that CP 1 encountered issues that could have been solved if the expatriate had received cultural training before the IA. With little international experience and limited knowledge about aspects such as the host country's particular way of exchanging business cards, CP 1 encountered smaller cultural blunders. However, CP 1 was eager to learn and adapt to the new ways of conducting business, and picked up the right manners quickly. This indicates higher levels of cognitive CQ, and we argue that the IA might have led to a higher level of CQ for CP 1:

"Everything from how people behave to all the cultural differences you get with food, weather, and climate. ... I tried to travel as much as I could, just because I had the opportunity.

... see all the poverty, and how they live. I think that at least gave me, how should I say it.

A more down to earth or humble picture of the world ..."

- CP 1 about life abroad

CP 1 enjoyed life abroad, learned more about different cultures, and we did not find evidence of a culture shock. However, what CP 1 is expressing is an interest in new cultures, and not the ability to adapt to the cultures the expatriate visited on weekend trips. What CP 1 refers to as cultural differences is mainly the climate, which we argue is a pragmatic aspect.

Despite living in a city with a high crime rate, CP 2 and the family had a rather smooth transition on the first IA. Settled in a gated community, they found their safe spot and had a great life abroad. They built up a large network, consisting of mostly other expatriates, and were occupied with activities every weekend. After two and a half years on the first IA, CP 2 and the family saw it was time to leave as many of their friends already had ended their IAs. The transition to the second IA was a lot harder:

"But yeah... some challenges, there are illnesses. Health care is non-existent. Poison stuff, pollution. Food poisoning was very very common. 'How can you prepare someone for food poisoning?' ... It was quite hard in the beginning."

- CP 2 about life abroad

The issues the family encountered was mainly of pragmatic origin. In addition, as we will discuss in Chapter 4.2.5, the spouse went from a career on the first IA, to not working on the second IA. What is interesting though is that the family ended up feeling more secure in the second host country that has larger cultural difference from the home country. This is probably due to the massive security measures that were in place. CP 2 described entering the children's school as entering Fort Knox, including many security checkpoints along the way. Despite two host cities with high crime rate, the family proved to be quite adaptable, and the expatriate did not report on any encounters with culture shock.

Despite the initial feeling of being on holiday, CP 3 adapted rather quickly to the life as a dual-career couple abroad. Reporting on struggles due to food and the climate, it was bringing the children to an international school that was the main problem:

*"I think I was shocked in a way, how could we do that? But it worked out really well
... It took a couple of months and then my child was ok in English."*

- CP 3 about life abroad

CP 3 struggled with sending the youngest child to school, while the child adapted well despite the limited English proficiency level. This is not related to the local culture, but can be seen as an expression of an overprotecting parent. The oldest child struggled with adapting to the school system, and decided to return home after a year. The rest of the family enjoyed life abroad, but did not interact much with the locals:

"We did not mix too much ... That is a bit difficult because you know you are staying for a short period, so you do not invest too much in relationships with locals. ... Because you do a lot of different things, it is easy to travel to anywhere else in that area. Yeah, I think it was good."

- CP 3 about life abroad

Finding a stay of three years too short for investing time in relationship is interesting. This reluctance to invest in relationships is not necessarily reflecting unwillingness to adapt to the new culture. Relationship building is noticeable different in CP 3's host country than the home country, which can make it difficult for a dual-career family to find time to socialize with locals.

CP 4 lived in a rather isolated location during the hitches. With hitches lasting four weeks followed by four weeks off in the home country, we believe CP 4 had fewer incentives for adapting to the host culture as the other expatriates. Interestingly, CP 4

showed the greatest interest for the culture in the host country among our interviewees in ConocoPhillips, and reported understanding for the culture's norms and traditions. This indicates cognitive- and motivational CQ, but despite this, CP 4 never adapted to the host country culture:

"I did not adjust properly, no. ... It was more like I was holding my breath you know, I was coming there and just waiting to get back home. It was not a pleasant stay. ... It is a restraint on the family when you do this, so that was a concern. ... After half a year my wife left me, that was a big cost. ..."
- CP 4 about life abroad

CP 4 encountered a lot of stress moving back and forth, which affected the marriage severely, ending in a divorce. This is evidence of that the stress of rotation affected the relationship over time, confirming the concern of the scholars presented in 2.1. CP 4 reflected on this topic, and believed that the restraint was much harder than expected. CP 4 also thought that this might have been avoided if the family moved together to the host country, indicating that a traditional IAs leads to less restraint on relationships. Combined with the personal problems and limited language proficiency, isolation was a big challenge. CP 4 worked long hours and spent little time socializing:

"... at work it was basically my ConocoPhillips colleagues and the interpreters I was able to communicate with. ... I was probably working out some days just to get out of my, you know, loneliness. I was also tired, I went to bed quite early. ... And of course, vodka is available everywhere, so sometimes you take some vodka and sort of doze off."
- CP 4 about life abroad

On the breaks in the host country CP 4 was tired, and instead of fulfilling the dream of spending time enjoying life with the spouse and child, CP 4 was exhausted. The findings presented until now paints a dark picture, which might lead the reader to believe that the IA caused this. This is not true, as the IA was going great workwise for CP 4 who had a good relationship with the manager, which we elaborate on in Chapter 4.2.4. CP 4 also came close of realizing a project with high personal involvement. Trips to the capital enabled CP 4 to enjoy parts of the IA. Even in a country where locals say one should not feel safe, CP 4 felt right at home in the capital. Based on these findings we argue that CP 4 did not encounter any culture shock, as the problems were rooted in personal issues, isolation, and a change of management.

During the last year of rotation CP 4 got a new manager. It is important to notice that our findings only include CP 4's experiences, but what CP 4 described was heartbreaking. The new manager cancelled the project CP 4 had been working on for years, ignoring the original goals set in the IDP. Instead, new goals were added at the end of the year, making it impossible for CP 4 to achieve the targets ending with a low score on the IDP. The conflict led to what CP 4 described as a toxic work environment. Despite the isolation and personal problems with the spouse, the IA was rewarding enough for CP 4 to continue on rotation. As it was the problem with the new manager that took away the pleasure at work, we argue that despite showing many signs of depression, the problems were of pragmatic nature and CP 4 did not encounter a culture shock.

Company Comparison

Living abroad we found that all of the expatriates reported on smaller issues, mostly related to food and climate. None of our findings support that the expatriates experienced any culture shock, which is a deviation from the expatriate literature from a cultural perspective. We argued that the problems were related to pragmatic aspects, hence being more natural reactions to the environment abroad. Except from CP 1's small blunders, we did not find any evidence supporting that the expatriates who had gone through the cultural course adapted better than those who did not go through the course before relocation. This is a deviation from the expatriate literature supporting a cultural perspective, as cultural training is highlighted as an important basis for cultural adaptation.

Overall we found that all the expatriates, managed to have a decent life abroad as long as the pragmatic issues were solved. With solved we mean that the expatriate found their work satisfying, the family had a place to stay, and schooling for the children. This finding supports that the pragmatic perspective contributes to a superior understanding of successful expatriation, as none of them adapted to the culture in the host country.

4.2.3 Contact and Support from HR

The recommendations highlighted in the expatriate literature is to have several contact points available for the expatriates to accommodate individual needs and to lower the threshold for contacting HR if and when there is need for it. It is also recommended that the support should be altered to the individual.

Innovation Norway

Our findings show that little is done from HR in IN to follow up the expatriates while they are abroad:

“Follow them up? No, we are in contact with them. ... it depends. Some of them are in contact with us a lot, and others very little. ... It is a choice they make. But this organization has been traditionally based on kind of self-management. So we have not done anything with it. We have just accepted that. ... We would like to have more contact than we have traditionally had until now.”
- HR IN about contact and support from HR

The statement confirms that Innovation Norway deal with contact and support of their expatriates on an ad-hoc basis. That the expatriates are managers might also indicate that they are more autonomic than an average employee, and therefore do not need as much support, which was mostly confirmed by the expatriates. With this said we do not indicate that there is *no* need for contact and support, as all of the expatriates pointed to lack of support while they were abroad. IN 1 thought the system functioned quite well, and did not need any special support from HR. What IN 1 felt was lacking, was support from the regional manager:

“You should as a minimum call once a week. That is the absolute minimum. ... the system at home is controlling and following you up on economic figures and things like that. You feel like you really need managerial support.”
- IN 1 about contact and support from HR

IN 1 expressed a desire to have someone that follows and supports the expatriates while they are abroad on their first IA. We can question whether it is HR support as such IN 1 is lacking here, or if the expatriate express a desire for a mentor, as the system only require the expatriates to report on their business progress. As we will come back to in the following chapter, the regional managers in Innovation Norway can act as mentors. What is important in relation to support and contact with HR, is the general attitude among the expatriates in Innovation Norway:

“I mean if you do not ask, you do not get anything. You have to ask for whatever it is. Otherwise, you are all by yourself. ... “
- IN 3 about contact and support from HR

According to IN 3 the expatriates from Innovation Norway are kept up to date through the intranet, and have to actively seek out any support if they need it, which was also confirmed by the other expatriates. We can then question whether this indicates a “out of mind, out of sight” mentality from HR. The expatriates reported on a lack of understanding, as IN 2 puts it:

"I do not actually think they understand how it is to be out there. To be honest, I think I missed the attitude of them supporting you. Asking you 'how is it going, do you need anything?'"

- IN 2 about contact and support from HR

The interviewees with longer experience within Innovation Norway seemed to be prepared for this lack of support, and hence did not think that much of it. One of the expatriates reporting a random e-mail does not support any findings of a genuine support network from HR. This makes us question whether HR has an attitude that there are no problems as long as none of the expatriates reported on it. However, once assistance was needed, the HR division was quick to help:

"... at some stage I actually asked for help at the HR department. Because it came to a situation where it was 'them and me', you see. And then I used the HR department as sort of a third party, and that helped a lot. It just loosened up. I actively used the HR department, and that was a great support."

- IN 2 about contact and support from HR

IN 2 experienced a conflict with the local employees on the IA, and reached out to HR for support. This finding is the only one from Innovation Norway supporting any cultural issues abroad, as the conflict was bound in the aspect of saving face. *Face* is related to the dignity of the individual, and is closely linked to social standing and positions (Hu, 1944). Here we talk about a cultural *conflict*, and not a culture *shock*. IN 2 did go to the cultural training before the IA, indicating that the courses are not able to prevent every potential problem abroad. The HR representative from Innovation Norway was eager to assist, and with HR as a mediator they solved the conflict.

ConocoPhillips

ConocoPhillips' decentralized HR divisions give the expatriates HR representatives to contact both in the home- and host country. The HR representatives reported that the local HR departments handle most of the issues, and that little responsibility is theirs while the expatriates are abroad. However, there is one major aspect they wish they could do differently:

"We miss that we should have been visiting them in the countries. ... I think they would have benefited from that. Us coming and talking, just to see the conditions they live in, see how it looks."

- HR CP about contact and support from HR

The HR representatives in Norway work to include visits to the expatriates in the HR policies, but are restricted by the global policies. The interviewees from ConocoPhillips reported that expected little or no follow up from HR while they were abroad. Most of

the expatriates did not have any problems, and hence did not need any particular support. They all knew that they could contact HR if they had any problems, but we found a general attitude suggesting that HR could have been more proactive. HR never asked how the expatriates were doing, hence overlooking CP 4's problem discussed in Chapter 4.2.2:

"Maybe that should be something that get picked up, you might need 'what is going on?' Maybe that is too much to ask? But it is just, I felt, at least when you leave someone should ask you 'why are you leaving?' Because it might be a story there to be understood."

- CP 4 about contact and support from HR

CP 4's situation was never detected by the system, despite the unusual activity on the IDP.. If HR had been proactive, the HR department could have detected the problems leading to the situation, and hence solved them at an earlier stage.

Company Comparison

Our findings show that the general expectation among all our interviewees was to get little or no follow up from the HR department in home country. ConocoPhillips have more formal HR support systems in place than Innovation Norway, who deal with issues on an ad-hoc basis. ConocoPhillips have an HR function in all their subsidiaries, whereas many of our interviewees from Innovation Norway talked about their regional managers as their main source of support.

In general, our findings showed that none of the case companies acted proactively in supporting their expatriates, indicating a deviation from the ideal where the expatriates should be given a range of contact points, adjusted to their individual needs. Many of them felt that they were left on their own to deal with any issues that occurred, and that they knew HR would be available if needed is not a sufficient base for HR to act as a supportive means while the expatriates are abroad. In both case companies we found that the HR representatives wanted to improve, and that HR in ConocoPhillips had a strong desire to visit the expatriates abroad.

Even though there was some discontent with regards to pragmatic support from both case companies, the issues were of pragmatic nature and did not have any major effects on the IAs. With regards to support for the cultural problem, IN 2 was pleased with the assistance given by HR. The only problem we found that was not treated correctly was CP 4's situation. CP 4 never reached out to HR, but ConocoPhillips had the IDP where

warning signs should have showed up, indicating a deviation from the pragmatic perspective.

In both case companies we can question who is responsible for following the expatriates. There seems to be a structure on a pragmatic level, even though one can question how effective it is. The difficult question is who is responsible to follow up the expatriate on a more personal level, related to the cultural perspective. In Innovation Norway the expatriates have an attitude that this responsibility lays with their regional managers. As they have a lot of responsibility on their hands already, we argue that this responsibility should be put on HR in Norway or a mentor. In ConocoPhillips the responsibility are divided on three actors, with HR in both the host- and the home country, in addition to the original managers in the home country. We will come back to the original managers' role in Chapter 4.3.1.

4.2.4 Mentoring

Ideally, mentoring can be used as an objective support, during, and after an IA. A mentor can be seen more as a guiding colleague, or to help adjust to the local culture.

Innovation Norway

Innovation Norway does not have any formal arrangements for mentoring. The HR representative highlighted that mentoring is good as it gives the expatriates someone independent to discuss issues with, regardless if it is connected to the work setting or more cultural related issues. The expatriates were all positive towards mentoring:

“What I wanted to have was a type of mentor, one that had been out there before and knows what you are. Not HR, not someone you report to. ... Someone to discuss Innovation Norway and work related issues with. ... You could always discuss this with the embassy ... but they did not have the issues we had in Innovation Norway.”

- IN 2 about mentoring

IN 2 expressed a desire for having a mentor, a colleague who had the experience of balancing Innovation Norway and the embassy. Dealing with the cultural conflict at work, IN 2 wished for a mentor to discuss the local culture with:

“My challenge was that I did not adapt quickly because I did not see what style was actually suitable. So if I probably had been better briefed or had a good mentor at the start, we had probably avoided some noise. ... I think the more apart the cultures are, the more important it is to have someone to bridge it.”

- IN 2 about mentoring

Among the other expatriates, we found that experience within Innovation Norway helped them, as those with longer experience reached out on their own and used their network to find a mentor:

"... a good friend of mine, I use him from time to time. Apart from that, I am very self-going, but personally development lack from time to time because I am not very good at using a personal mentor. ... It should be a part of the package I think."

- IN 4 about mentoring

IN 4 valued to have a third party to talk to. IN 4's mentor had experience within Innovation Norway, but still was an outsider relatively speaking. The next statement made us question of whether it is necessary for Innovation Norway to set up a formal system to arrange mentoring, or if they already had an informal mentor system in place:

"If you have a very good regional manager you do not need a mentor. But if you have a regional manager who is not good at follow up, then you should have a mentor. But you can make one yourself. ... Ask them to be your mentor."

- IN 1 about mentoring

The regional manager can be used as mentors, and as many of them are also expatriates, they might encounter similar challenges. The regional managers are responsible for offices in a region, meaning that all the office managers are in regular contact with them and report about the status of their office. With today's structure, the regional managers in Innovation Norway are often also a manager at one office abroad, leaving little time and energy to support the office managers on other levels than professionally. This can reduce the ability of the regional managers to act as a supportive means, and hence reduce the support expatriates in Innovation Norway receive. There is another issue also, the fact that the expatriates *report* to their regional managers. The essence of mentoring is to have an outsider, as issues or guidance might be needed with regards to the immediate manager. Taking this into consideration, we argue that the regional managers are too close to be a formal mentor.

ConocoPhillips

In ConocoPhillips the HR representatives reported no formal mentoring arrangements, as it is not a part of the global HR policy. However, the HR representatives recognized that some informal arrangements took place in the company. The expatriates were all positive towards mentoring:

"Maybe a mentor that has been in the area is of course great ... but also work wise. Just to have an, I guess, an older, or it does not need to be older, but a more experienced person you can talk to and share your concerns with and just talk. ... Kind of be your hobby shrink."

- CP 1 about mentoring

CP 1 set out with the goal of finding a mentor abroad, highlighting the importance of the mentor having similar experiences from an IA. Unfortunately, a mentor came into the picture too late for the expatriate to benefit greatly from it. CP 4 who found a mentor early on described it like this:

"Well, I would say my boss was my mentor ... Basically around the clock. I could have called him if I was in trouble. ... He could help me find where I should buy stuff, he was taking care of me. ... My former boss was taking care of me very well, but I think it is more him than the system."

- CP 4 about mentoring

Here we see an example of a manager that acted as a both pragmatic- and a cultural mentor on an informal level. As discussed in the Chapter 4.2.2, we encounter the dilemma of who could or should be a mentor. CP 4 was reporting to this manager, and hence could experience that work related issues could be difficult to discuss. This unfortunately became a reality with the change of management. The relationship to the new manager was negatively impacting the expatriation experience for CP 4. Losing the first manager entailed just as much a loss of a great manager, as a loss of a valuable mentor that made the days abroad more worthwhile. CP 2 on the other hand, who had management responsibilities abroad, had a different perspective on mentoring:

"No, I was a mentor, I had to. ... I basically had to mentor someone who could replace me when I left, so that there is someone in place who could take my job competent and trained by me. I mentored 10 people at least, all locals. There is no mentoring program for expats."

- CP 2 about mentoring

What CP 2 reported on is a result of an arrangement in the host country, and not a policy from ConocoPhillips. The industry is structured with a state ownership where mentoring was to some extent a part of the justification for using expatriates. This particular position was only open as an expatriate position for a limited period of time, where the ultimate goal was to prepare the local staff to take over.

Company Comparison

The findings in both case companies are similar with regards to mentoring. All the expatriates are positive to mentoring, and many of them seek out to find their own mentors, as none of the companies have formal arrangements in place. In line with the recommendations from the literature, the expatriates who found a mentor reached out to a more experienced individual in the respective organizations. However, the lack of formal arrangements can be seen as a deviation. This deviation can be explained from both perspectives, as a mentor can be pragmatic and help with practical work related matters, in addition to being cultural and help with cultural adjustment. None of the expatriates had a mentor in both the home- and the host country, an additional deviation from the recommendations.

There are also similarities with regards to who could or should be a mentor. In both case companies we found tendencies of managers acting as mentors. We argued that this can leave restraints on the mentoring aspects, as a manager is too closely connected to any issues or problems the expatriates seek help and guidance for. With that said, any mentor type seemed to benefit the expatriates, and was probably better than having no mentor at all. We also found there was a correlation between the experience within the respective companies and the ability to find a suitable mentor.

4.2.5 Spouses and Dual-Career

The expatriate literature revealed that expatriation has traditionally it has been one expatriate with a trailing spouse. Dual-career couples are increasing in numbers, bringing new challenges for HR, while only few companies report on actual policies for the spouse. For the trailing spouses, the challenge is to stay occupied to avoid loneliness.

Innovation Norway

Most of the spouses in Innovation Norway belonged to the trailing spouse category. The HR representative did not report on any particular follow up focusing on the spouses, leaving them to manage themselves. There had been some cases where Innovation Norway had been in contact with the spouse, but that was more an exception than the rule. We found differences on whether the expatriates were accompanied by a spouse or family, and also in the time the spouse spent abroad. IN 4's spouse only came on visits, as presented in Chapter 4.2.2, while IN 1's spouse only spent part of the IA abroad:

"No, the first year I was alone. The second year my spouse was there, and partly the third year I was alone. ... I think this is the main challenge when you go abroad with your family, that the spouse will lose quite a lot. ... It is very difficult to be career oriented and at the same time be stationed abroad because you are forgotten very quickly."

- IN 1 about the spouse

The statement indicates that IN 1 was a part of a dual-career couple in the home country, and that the IA put a restraint on the spouse's career. We have little knowledge about how the spouse experienced the IA, as IN 1 was purely focusing on the IA and work related issues during the interview. Even though we got the impression that the spouse was not included as an equal partner in the decision to take on the IA, IN 1 obviously cared about the spouse losing out career wise. However, from our findings, there is reason to believe that IN 1's spouse felt rather lonely and isolated abroad, as the main network consisted of people from the embassy.

The last two expatriates from Innovation Norway had their family abroad for their entire IA. While agreeing on taking on the IA, IN 2's spouse was not able to work in the host country. Instead, the spouse made an effort to become occupied with personal interests. IN 2's spouse had taken language lessons before arrival, which helped managing in the new environment. The language proficiency level was good enough to manage shopping and simple conversations with the locals, making daily activities a lot easier. According to IN 2, the spouse grew to love the host country:

"There was no work situation. My spouse was doing fundraising ... All volunteer work, and had newcomer coffees where all expat spouses were invited to our home once a month. So my spouse knew everybody, all the new expats, I was only presented as the spouse."

- IN 2 about the spouse

The spouse found a way to do productive activities as well as enjoying family life abroad, making daily life rewarding. The ability to create a network among the other expatriates' spouses kept the spouse occupied, even though the spouse spent a lot of the time as a single parent in the host country. When the first IA came to an end, the spouse demanded that the next IA would be closer to the home country.

IN 3 and the spouse were both working for Innovation Norway before the IA, and functioned as a dual-career couple abroad along with their two children:

"My spouse worked 40%, two days a week for the IT department, and one day at the school as a volunteer."

- IN 3 about the spouse

IN 3's spouse had never been to the host country before, but was able to find a satisfying mixture of activities. As Innovation Norway does not have any special selection processes for dual-career couples as presented in Chapter 4.1.3, we found that this agreement with the IT department was made on an ad-hoc basis.

ConocoPhillips

ConocoPhillips has some guidelines for funding the trailing spouses, including education and finding work in the host country. However, HR in the home country does not advise the spouses to work abroad, to avoid trouble with social security arrangements in Norway. There are no systems for following the spouses while they were abroad, indicating that they were left to manage themselves.

CP 1 was accompanied by the spouse approximately half the IA. As the couple had discussed the possibility of an IA, the spouse was prepared that the expatriate wanted to go abroad if the opportunity opened up. However, none of them were prepared for how quickly it happened:

"Yes, most definitely my spouse had a lot harder time to adapt than I. ... My spouse came from a job in Norway and is a social person, and went down there to nothing, and had to start all over again. Also we are so young so it is hard to find people at our age."

- CP 1 about the spouse

It was not the culture that was difficult to adapt to, as the spouse were used to work and socialize in the home country, life abroad was rather lonely and lacked any specific purpose. To fill the time abroad CP 1's spouse applied to study English in the host country. Even though ConocoPhillips provide funding and have policies for this type of spousal support, CP 1's spouse did not get any financial support for the studies. CP 1 reported this as an obstacle, and expressed a need for more guidance from HR in helping the spouse find activities and social connections in the host country, as it was difficult for CP 1 to provide this support.

Whereas CP 4 moved alone on rotation, CP 2 and CP 3 were both a part of a dual-career couple abroad, as presented in Chapter 4.1.3. As both expatriates' partners already worked for ConocoPhillips, the working permits were easier to attain. CP 3 got a position on the same project as the spouse, whereas it was not that easy to find a position for the CP 2's spouse as well. ConocoPhillips is not directly promoting the

possibilities of taking on an IA as a dual-career couple, but deal with it on an ad-hoc basis:

"I got the job and there was no job lined up for my spouse. ... was too young to have a true expat package deal, because there is a minimum requirement of five years' experience So that provided some challenge, but we were quite clear that we were not going to take the job unless my spouse was also getting an opportunity to work. It turned out quite well."

- CP 2 about the spouse

Being young, combined with little experience within the company, it was difficult for the spouse to get hired as an expatriate. The solution was that CP 2's spouse entered a training program for one year, with the objective of rolling into a proper IA if performance was satisfying. Even though the couple had to fight hard for this to happen, they were quite pleased with the support they got from HR in the home country. After all, it was ConocoPhillips in Norway who paid for the training year. Eventually, CP 2's spouse enrolled in a proper IA with the same position as the training program, but now being supported by the host country. This finding shows how ConocoPhillips adapt their recruitment policy to hire the right candidate, even if it includes the challenges of a dual-career couple. Moving from a good career in the first host country, CP 2's spouse followed as a trailing spouse on the second IA. The process was very difficult for the spouse who did not know for how long the next IA would last. Eventually, the spouse grew to love life as a trailing spouse and enjoyed family life abroad.

Company Comparison

We found that none of the case companies have a clear support network for the spouses, a deviation from the recommendations in the literature. While most of the spouses were included in the preparation and training process, they were left to manage themselves abroad. ConocoPhillips do have policies for the spouses with regards to education and work abroad, but our findings show a pragmatic deviation, as CP 1's spouse did not get funding for education. None of the spouses struggled with culture abroad, and while some were self-driven and managed to create a rather good lifestyle abroad, others struggled with finding activities and social circles to make life abroad meaningful. We found that the spouses who were abroad for shorter period of time struggled more to adapt to life abroad, compared to the spouses who stayed abroad for the entire IA. As the expatriates were working long hours at the office, they were not able to offer much support for their spouses, indicating a need for HR support.

4.3 Stage 3: Repatriation

The last stage in our model involves the timeframe from preparing to come back to the home country, to the expatriate have landed and is established in a new position. The literature considers repatriation as the biggest challenge with regards to expatriation. As many companies struggle with managing the repatriation process successfully, we have divided repatriation into three subcategories in our Expatriation Model.

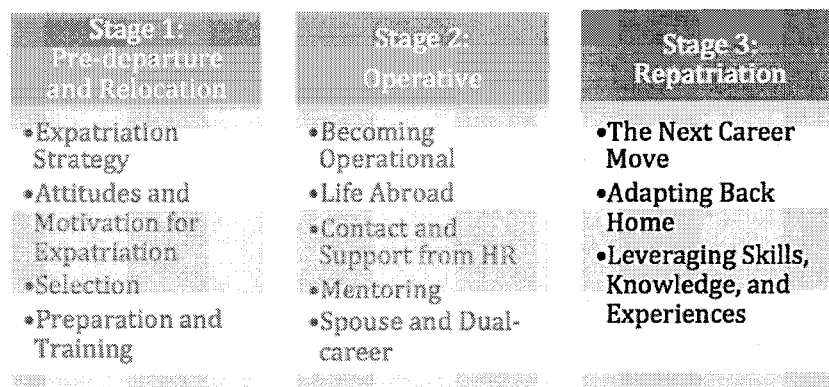


Figure 7: The Expatriation Model - Stage 3

4.3.1 The Next Career Move

The literature recommends the repatriation process to start some months before the expatriates are coming home, and should to link it to the purpose and goals of the IA. Many expatriates struggle with insecure career prospects, and are often placed in temporary positions. Because of this, it is important for HR to create realistic expectations, through involving the expatriates in the repatriation process.

Innovation Norway

According to the HR representative, Innovation Norway ideally starts the preparation process six months before the IA ends. At this stage there is a clear difference between the external- and internal expatriates, as the external expatriates are leaving the company upon return to the home country. Our findings from Innovation Norway only include three of the interviewees, as IN 2 moved on to a new IA at the time of the interviews. In the interview, our focus was on internal expatriates returning to a new position within the organization:

"... and the not so happy ending ... Not having a new position, not knowing what to do. At least, you might have something."

- HR IN about repatriation

The internal had good positions in Innovation Norway before the IAs. As Innovation Norway is a small company with only 700 employees, it can be difficult to find an opening at the same management level of the organization upon repatriation as the turnover rate was close to zero. Finding a similar position at the headquarters in Oslo is also challenging, and even more so to relocate an expatriate to a regional office. There might be a vacant position somewhere, but it can be difficult to find a suitable position in the region the expatriates desire to work in. The HR representative reported that their preparations are insufficient upon return, and that they need to start the preparations as early as a year before the IA ends.

The HR representative recognizes that the repatriation process is not over until the expatriates are settled in the home country, both at work and at home with the family. The process is different depending on the individual, making the HR representative regret not keeping in contact with the expatriates. The expatriates reported that the repatriation process was challenging:

"It is hopeless to discuss with a director six-seven months before because they really do not have an overview at that time. ... You could start the process, but do not expect too much."

- IN 1 about repatriation

IN 1 highlighted the limitations of starting the repatriation process early, as it is difficult to foresee changes in employment ahead of time. It should be noticed that Innovation Norway reported a rather stable workforce, with relatively low turnover, making it even more difficult. Generally the expatriates expected little or no help from HR in the process, and were therefore not disappointed. IN 4 had a top management position in a regional office before the IA, making it difficult to find a similar position upon return. The regional offices are smaller in size and rarely have vacant positions available when needed. The only regret IN 4 had was not spending more time on the IA contract and the details around repatriation. To overcome this, IN 4 decided to be proactive and initiated the repatriation process nine months before the IA ended. With a three months extension to the IA, IN 4 spent almost a year actively seeking a new position:

*"... I was offered October as a period of time to make some landing.
... And I should start here 1st of November. All I met was an empty
table, no phone, no pc, nothing. And my manager was on travel."*

- IN 4 about repatriation

It should be noticed that IN 4 only have a few years left before retirement, which might have decreased the effort from Innovation Norway to find a new position. IN 4 eventually got a project ending the summer of 2013, meaning that the expatriate is still uncertain about the future within Innovation Norway. Our findings indicate that it is likely that this happens to other expatriates as well:

*"Everyone have a job when they come back, but not the job they want. ... Innovation Norway does not guarantee what kind of job, there has to be a vacant position as well."
- IN 3 about repatriation*

To overcome the repatriation problems, all the expatriates proactively initiated the process themselves. IN 3 got a new position at headquarters, which became available due to a long-term leave. IN 1 chose to end the IA early due to personal reasons, and attained three offers with great support from three directors. The top management support indicates that actively using ones network within the organization can be helpful in the repatriation process.

ConocoPhillips

According to the HR representatives the repatriation process starts two to three months before ending an IA. While the host country HR helps the expatriates with formal documents and forms, the home country HR start the search for a new position:

*"We always find a job. That is not an issue. I think if there is not a position, they make one. It seems like there is always an opportunity for them."
- HR CP about repatriation*

The process of finding a new position is not a genuine problem within ConocoPhillips, and their turnover after expatriation was reported as non-existing. With a workforce of 1900 employees in Norway, ConocoPhillips are flexible, and can even create new positions if needed. The expatriates' original department, who has the expatriates on their list of employees while they are abroad, is responsible to find a new position. At team meetings the department discusses where they can use the capabilities of the expatriate, giving them a clear idea of what position(s) to offer. Having technical positions will also ease the situation, as repatriation to a similar position does not necessarily entail a management position. CP 1 is an example of this:

*"I guess it started maybe 3 weeks before I went home. Again, kind of similar to the way as I got sent down there, I was shipped home pretty fast. They needed people, urgent I guess. ... The job prospects were good ..."
- CP 1 about repatriation*

Being pulled back to the home country before the IA was completed, CP 1 felt that there was still more to achieve abroad, but the new position included a career boost. On the opposite side we found CP 2 who negotiated with the local government to elongate the IA, due to the requirements of the position presented in Chapter 4.2.4. However, a good position opened in the home country, which was more or less a perfect next career step:

"Well, you have your annual discussion with your supervisor where you discuss what your plan is and what you want to do. ... So for the last couple of years we have been open to various stuff. But we have been set on going back home ..."

- CP 2 about repatriation

Despite elongating the IA, CP 2 was recommended applying for the position in the home country, and got it. Our findings also included exceptions, where the expatriates had to proactively seek out a new position themselves:

"I would have expected them to be a little bit more proactive about getting me a new job here, when they knew I was going home. It was more 'Oooh, you are coming home. Do we have any jobs? I do not know' ... I got 3 offers, but yeah, I would have expected that maybe would have been followed up more."

- CP 3 about repatriation

CP 3's project ended in 2012, but the expatriate did not feel that the team manager back home was proactive enough in the repatriation process. Eventually, CP 3 got a new position, even though it was not necessarily a better position. We also found that IDP can be of hinder for the expatriates. The management change, presented in Chapter 4.2.2, was devastating for CP 4's IA and the further career move:

"My career has taken a hit by being an expat. ... you do something that maybe is really useful for you professionally ... They do not know if you have been abroad, or left the company or something. So you come back and have to prove yourself again."

- CP 4 about repatriation

Due to the problems with the new manager, CP 4 initiated the repatriation process late 2011. Knowing that there were many open positions in the home country, CP 4 thought repatriation should be easy. As the project abroad was about to be sold and the manager wanted everyone to stay to the end, it was negotiated one additional rotation. The disagreement with the new manager resulted in a low performance score, affecting the type of position CP 4 was eligible for upon repatriation. Eventually CP 4 ended up with a technical job, but will not be eligible for a promotion due to the low score that is saved in the IDP for a few years. CP 4 is now dependent on performing well the next few years to achieve the career boost the IA was supposed to bring.

Company Comparison

As both case companies start their repatriation process three to six months before the expatriates return, in line with the recommendations. In Innovation Norway we found that they deal with repatriation on a more ad-hoc basis. Where the purpose of the IA is not linked to the process, we found a deviation from the ideal. The external expatriates are leaving the company upon return, which we argue is to a greater extent linked to the strategy of position filling. However, the internal expatriates are continuing in the company, leaving them with a dilemma, as it is difficult to find new positions. We found that some of the expatriates came home to a new position, and some had a boost in their career. IN 4, who only have been given a project, indicates a deviation. On the other hand we can argue that all the expatriates are confirming the difficulties of relocation as a manager, where some were relocated to a lower level in the organization.

ConocoPhillips is more proactive in the repatriation process, supported by their HR- and the IDP system. With more formal systems in place, it is also easier to find suitable positions for the expatriates. It should be noted that the type of position and the company size might ease the process. As the expatriates in ConocoPhillips are included in their original department while they are abroad, the repatriation process is also better linked to the purpose of the IA. The original managers are responsible for finding a new position for the expatriates, while other managers can request the expatriate if they need their capabilities. The problem in ConocoPhillips is the coordination and making sure that the right people actually take responsibility for finding a new position. We found that CP 1 and CP 2 had a boost in their career, confirming that their IAs were linked to the purpose of management development. CP 3 and CP 4 did not experience the same career boost, but at the same time they were abroad on more technical projects. For CP 4 we found evidence that the IDP system restricted the career boost, which was devastating for the expatriate. That the IA did not lead to a career boost is not a deviation, but evidence of the performance score in the HR system functioning well.

That some of the expatriates initiated the repatriation process themselves can be seen as a deviation, as HR ideally should start it. In Innovation Norway the expatriates expected little or no help from HR, a reality confirmed by our findings. The expectations were somewhat higher in ConocoPhillips. For CP 3 and CP 4 the repatriation process did not manage to live up to the expectation, which can be seen as a deviation from the

recommendations in the literature. The only deviation that is of concern is that none of the case companies actively try to create realistic expectations. All the deviations pointed out here are of pragmatic nature, and are mostly caused by lack of HR initiative.

4.3.2 Adapting Back Home

In addition to getting a new position, the process of the expatriates and their families adapting back home is a challenge, which can lead to reverse culture shock. They need to re-enter the social scene, in addition to the spouses and children re-entering work life and school. It has been argued that coming home might be harder than leaving, as both the expatriate and aspects in the home country have developed throughout the IA.

Innovation Norway

Innovation Norway support all their expatriates with the practical aspects of moving, but do not provide any debriefing with their expatriates after arrival. Like moving abroad, IN 1 looked at coming back as a pragmatic aspect:

"The only thing I experienced is that there is some, what could I say, administrative things to sort out. And that would probably take a month and then everything is as it should be."

- IN 1 about repatriation

IN 1 described a typical star stage with plenty of administrative issues to sort out upon arrival. We argue that this description is related to pragmatic issues, and not the start of a potential reversed culture shock. IN 1 took a week off before starting work, which gave some time to land back home before picking up the pace again. However, IN 1 confirmed that it is easier to go abroad, like all interviewees from Innovation Norway:

"It is easier to go abroad, it is worse to come home. Because when you go abroad you are very focused, you have a plan on what to do. And, I think that you are prepared. When you get home you are not that prepared because you think you are coming back to the same place that you left, but you do not!"

- IN 1 about repatriation

IN 1 is a determined and focused individual, and reported on no signs indicating any encounters of reverse culture shock. Once the minor pragmatic issues were sorted out, IN 1 was living life as before the IA. IN 3 also had an easy transition back, as the spouse and children had moved back to the host country a few months before in time for the new school year. With less difference in climate during the Norwegian summer, IN 3 reported that the family adapted back home rather quickly, including sorting out the living situation. IN 3 struggled more with the weather change coming back before Christmas. The expatriate also reported that it was challenging to find back to the

routine of taking the bus and train everywhere, instead of living next to the office. These issues are of pragmatic nature, and can be seen as similar to the issues that most of the expatriates experienced when moving abroad.

We found that IN 4 was given a month off upon return, which might have reduced some of the stress of relocation. While enjoying life back in the home country with the family, IN 4 missed the luxury perks from abroad:

"I lost my driver and housekeeper. That was a big fault. Yeah. ... No, to be serious, it is good to be back again ... It was a perfect life abroad but I missed my family."

- IN 4 about repatriation

Losing luxury perks might seem superficial, and IN 4 confirmed that even though life abroad was perfect, it was a restraint to miss the family. For IN 4 readjusting back home meant a lower standard of living in terms of materialistic assets. This is a pragmatic adjustment that is unrelated to reversed culture shock.

ConocoPhillips

ConocoPhillips do not provide any debriefing session with their expatriates, but they do help their expatriates with the practicalities of moving back home. We found some differences on the time that have passed since repatriation, ranging from a year for CP 4, to only a month for CP 2. With only a few weeks passing since return, CP 2 was quite occupied with adapting back home on the time of the interview:

"Right now we are so busy that we do not have time to think about any shocks. ... I have to renovate my house ... Abroad we had a lot of Norwegian friends ... so I do not foresee it will be a big shock on me. We are quite adaptable and have been several places."

- CP 2 about repatriation

As CP 2 is renovating the house, the family is adding decisions and stress on top of the normal administrative tasks upon return. After many years abroad and completing two IAs, the family decided to come home so the spouse could continue the career in ConocoPhillips, and because of the children's education. It is too early to reject the possibility that the family can encounter a reverse culture shock further down the line. The family socialized a lot with Norwegians abroad, indicating that they had kept in close contact with the Norwegian culture, despite spending many years abroad. As CP 2 reported that it is easier to come back than leaving, we argue that the adjustments are of pragmatic nature and that once the issues are solved, the family will go back to their daily life. We also found that CP 3 thought coming home was easier:

*"Probably coming home was the easiest. Yeah, because you come home to something you know."
- CP 3 about repatriation*

Despite the spouse staying abroad for half a year more to complete the IA, CP 3 moved back to secure the child's education, a finding supporting the pragmatic perspective. The child was thrilled to come home, and enjoyed shorter school days with more time to play. CP 3 lost some luxury perks back in the home country, but as expected, re-entering the social life was more challenging:

*"That is a bit difficult, because they are going on with their life and you are going on with your life. ... It is not automatic that everyone thinks 'Wow, you are home, it is great! Let us spend a lot of time together!'"
- CP 3 about repatriation*

Prepared for the lack of interest among friends and family, CP 3 was able to adapt quickly. We argue that the falling interest from one's social network is a natural reaction to their lives developing in different directions when a person is abroad for longer periods of time, and not a reverse culture shock. For CP 4, coming home meant that the isolation and a toxic work environment was over:

*"Maybe starting working every day was a bit of a shock, but you know, it is so good to come home and not be exhausted. ... I think I must say going there was more challenging.
... But to come back here to Norway, it was like 'Phuu, I am home. This is good.'"
- CP 4 about repatriation*

After a tough last period abroad with many disappointments, coming home meant that CP 4 started with a new positive outlook on life, and had a much larger social network. Being on rotation, CP 4 had stayed in contact with the home country culture in the off periods, and therefore showed no signs of a reversed culture shock. Even though CP 4 came home to a new life situation, the expatriate had a gradual adjustment to the life as a single parent, and was able to enjoy all aspects of life again. CP 1 was the only interviewee from ConocoPhillips who thought coming home was harder:

*"I think actually it was easier to go abroad then come back for me. It is a hard question.
But maybe because I felt that I was not done yet, because I enjoyed it."
- CP 1 about repatriation*

CP 1 was pulled home before the IA was completed due to work arrangements in the home country, as discussed in Chapter 4.3.1. The transition back happened almost as quickly as the move abroad, leaving little time for preparation. CP 1 reported on a winter depression and some initial issues with sorting out all their belongings. We found no

signs of reverse culture shock, rather the opposite as CP 1's spouse was quite home sick, and was relieved to be home.

Company Comparison

We found that all the expatriates encountered some minor pragmatic issues when adapting back home, mostly related to the stress of administrative issues, loss of luxury perks, and change of weather. None of the expatriates reported on any major problems, and were able to get back into their normal lives as soon as the pragmatic issues were solved. We found no evidence of reverse culture shock, instead we found that most of them enjoyed being back home. The lack of reverse culture shock can be seen as a deviation from the recommendations in the cultural perspective. Our findings also show that the expatriates acted according to the literature, as the expatriates with children moved back home to secure their children's education. Their move was also tailored to the start of a new semester.

The major difference between the case companies was related to the question of which transition was easier. All our interviewees from Innovation Norway, in addition to CP 1, agreed that moving abroad was the easiest transition. This could be connected to the extensive preparation both case companies put their expatriates through before leaving, whereas the preparation upon return is limited or missing. That CP 1 agreed with the interviewees from Innovation Norway can be connected to the fact that CP 1 was taken off the IA before it ended. The other three interviewees from ConocoPhillips agreed that it was the transition back home that was the easiest. Their process of repatriation entailed more preparations or their projects abroad were completed, indicating that they might have been more mentally prepared on returning. This finding in ConocoPhillips can be seen as a deviation from the literature, where pragmatic support is missing. It can also be related to the findings in Chapter 4.3.1, and confirms that job security upon repatriation is a major factor in the transition back home. While the employees in ConocoPhillips came home to a higher guarantee of a similar position, the interviewees in Innovation Norway had a much more uncertain future. As none of the expatriates encountered any significant problems during repatriation, we believe this affected their answers to some extent.

4.3.3 Leveraging Skills, Knowledge and Experience

Ideally the companies should be able to leverage the skills, knowledge, and experience the expatriates have gained abroad. If the new position is connected to the purpose of the IA, this should be attainable. However, if the new positions are not rewarding for the expatriates, the literature highlight that many of them end up leaving their companies.

Innovation Norway

As Innovation Norway struggle to find new positions for their expatriates, they also struggle to leverage from their skills and experiences:

"We cannot continue not taking care of them. I think we have to take care of them. They have really good cultural skills, management skills, they have language skills. ... And we are not ready to take care of it."

- HR IN about leveraging skills, knowledge and experience

The HR representative reported on a desire to improve the situation, and we found that many of the expatriates highlighted room for improvement during the interviews. IN 3 pointed to little focus on internationalization, indicating that it is difficult to leverage the experiences related to the specific areas abroad:

"I think, in my position now I can utilize a lot of the experience I have, because now I work together with or for the offices abroad. But apart from that, normally you start in a position that has nothing to do with internationalization."

- IN 3 about leveraging skills, knowledge, and experience

IN 3 got the new position as a colleague went on leave, and Innovation Norway used the opportunity to restructure the responsibilities within that division. This enabled IN 3 to better utilize the knowledge and experience. According to IN 3 this was not done because of the expatriate, however, we believe that this might be the final drop to actually go through with the restructuring process. IN 1 agreed with the lack of internationalization:

"I can really use it now. So it is very spot on. ... The ideal situation is that you can use your competence, but as you probably know, the international knowledge is mostly used at the regional offices in Norway. They are not that focused on having people at the head office with international competence, because it is too far from the clients."

- IN 1 about leveraging skills, knowledge, and experience

The new position enables IN 1 to utilize the skills and knowledge gained abroad. The lack of internationalization can be seen in connection to many expatriates wanting to relocate to the headquarters upon return, whereas it is in the districts, close to the customers, the expatriates capabilities best can be leveraged:

"Being given the responsibility for this project is definitely to utilize my experience. ... I am very happy to be given this responsibility because that is given my competence credit I think. ... I think that HR really has a challenge to work out a system, a way of organizing the management of the offices abroad."

- IN 4 about leveraging skills, knowledge, and experience

Despite feeling that the experience is not valued, IN 4 is able to utilize the new knowledge and experiences in the project. Whether this will be true in the future is uncertain, as the career prospects after completing the project was unknown at the time of the interview. An interesting finding on the matter is that IN 4 would have considered going elsewhere if the expatriate had been younger. As IN 4 is approaching retirement and love the colleagues and work environment in Innovation Norway, the expatriate wanted to stay within the company.

ConocoPhillips

In ConocoPhillips all the interviewees came back to a similar or higher position compared to the position abroad, which is a great foundation for leveraging skills and experiences. However, the HR representative pointed to a lack of policies for it:

"That is also depending on the department. Nothing is written down, there are no guidelines on that. ... They are not utilized as much as they could be. Because they have much more knowledge than people know. ... I think we can ask more and get answers, and maybe give more information to their leaders. Do some mapping, how it is used."

- HR CP about leveraging skills, knowledge, and experience

Despite the IDP, no follow up is conducted on how the new skills and knowledge are leveraged after repatriation. However, we question who is responsible for leveraging the skills – HR or the managers? The methods used to find a new position, as discussed in Chapter 4.3.1, indicates greater realization of the benefits from expatriation. Both CP 1 and CP 2 got a better position than they had before:

"... it has helped me to think on business relationship. It is easier to understand the international business partners. ... when they put me in that position I guess they also utilized my experience ... they would not have given me that opportunity if I did not have the expatriate experience."

- CP 1 about leveraging skills, knowledge, and experience

The IA opened doors for CP 1, giving the expatriate a career boost, as well as enabling ConocoPhillips to leverage the skills and experiences. The same is true for CP 2, who had the biggest career boost upon repatriation:

"You always use your experience no matter where it comes from. ... I use all the experience I gained abroad and previously here in my new job, of course."

- CP 2 about leveraging skills, knowledge, and experience

Moving up the career ladder within ConocoPhillips, we found that CP 2 confirms the unwritten rule of attaining international experience before entering the management level. The new position enables CP 2 to utilize the experiences from both IAs, benefitting ConocoPhillips in the long run.

We found evidence that both CP 3 and CP 4 had similar challenging positions upon repatriation as before the IA. With the new experiences, the expatriates should be better equipped to perform the same job as before, while coming back to a similar position might indicate a lower level of leveraging the expatriates new skills and knowledge.

Company Comparison

Despite IN 4 struggles with finding a new position, the interviewees from Innovation Norway were all able to utilize their skills gained abroad. Our findings were more divided in ConocoPhillips, where CP 1 and CP 2 advanced in their careers, while CP 3 and CP 4 stagnated in similar positions as before the IA. Overall, we argue that all the expatriates are able to utilize their skills and experiences, confirming the ideal from the literature, despite not connecting the repatriation process with the purpose of the IA.

However, we found a difference in how the skills and knowledge are used in the respective companies. For Innovation Norway, the need of internalizing international knowledge is not as salient. What is more important is to channel the knowledge and experience to all the companies Innovation Norway are supporting. This indicates that the expatriates' knowledge are best leveraged if they are able to work with companies who are entering the specific markets abroad, either with business development or support in general. For ConocoPhillips, the technical knowledge and experience needs to be internalized and put in use into the production. ConocoPhillips use the new knowledge in the competition to create sustainable competitive advantages, whereas Innovation Norway shares their knowledge to create sustainable competitive advantages within the customer companies.

Our research showed that none of the case companies have any problems with turnover among their expatriates. Because both case companies are able to provide new positions for their returning expatriates where they to some extent are able to leverage their experiences, we do not see this as an issue for either company.

4.4 Summary of Main Findings

The analysis identified several deviations between the reality in our case companies and the recommendations in the academic literature derived in Chapter 2. Despite the differences in relation to size, nationality, industry, and in staffing strategies we found surprisingly similar deviations from the recommendations in the literature, with some varying degree. Our evidence indicates that ConocoPhillips is one step ahead of Innovation Norway on most aspects, but both case companies are still able to achieve successful expatriation. ConocoPhillips has most of the measures in place, but struggle to live up to the recommendations in the expatriate literature. Much of the struggles for Innovation Norway can be related to their size which leads them to deal with issues on an ad-hoc basis. However, we found no excuse for either of the companies to not support their expatriates adequately throughout the expatriation process. Even though the expatriate literature highlights the importance of culture in an international setting, this is not necessarily evident from the results of this study.

The major deviations relates to: contact and support from HR, culture shock, spouse and dual-career, repatriation, and leveraging skills, knowledge and experiences. We also found minor deviations in other parts of the expatriation process, but we do not see them to be significant enough to hinder successful expatriation.

When it comes to *contact and support from HR* we found significant deviations in both case companies. We question whether there is a “out of mind, out of sight” mentality from HR, as the expatriates reported on limited follow up. None of the case companies were proactive in following their expatriates while they were abroad, and the expatriates were left to manage themselves to a great extent. We also questioned who are responsible for following the expatriates while they are abroad, as both companies have rather unclear structures with several actors involved. An additional deviation we found was that none of the case companies arrange for mentor arrangements, leaving it up to the expatriates to initiate informal arrangements.

The cultural perspective focuses on *culture shock* as a part of IAs, whereas we only found evidence of the expatriates struggling with minor pragmatic issues abroad. Even though none of the expatriates truly adapted to the host country culture, we argued that all of them managed to create a meaningful life abroad as long as the pragmatic issues were

solved. We did not find any evidence confirming that cultural training helped ease the situation, leading us to question the need for the culture course.

Little is done to accommodate the trailing *wives*, while both case companies deal with dual-career couples on an ad-hoc basis. While the family was included in the preparation and training process, they were left to manage themselves abroad, which is a clear deviation from the ideal. ConocoPhillips has policies for pragmatic support for trailing spouses in form of support for education and finding a position abroad. However, we found that none of these policies were put in action. The trailing spouses who were self-driven managed on their own, whereas some of the other struggled with finding activities to keep them occupied and make life abroad meaningful.

We found that the *repatriation* process was inadequate in both of our case companies, as it there is little connection between the IAs and a future career path. Whereas ConocoPhillips are able to find a new position easier than Innovation Norway, none of the case companies are able to relocate their expatriates smoothly into a new position that benefits both the company and the expatriates. In addition, we found no evidence of support upon repatriation, leaving the expatriates to deal with the adaption process on their own.

The ability to leverage skills, knowledge, and experiences is highly connected to the new position the expatriates enter upon return. We found no evidence of the companies actively seek to leverage from the expatriates, who are left to utilize their skills and experiences on their own with no connection to the purpose of the IAs.

We argued that none of the findings are of cultural nature, but rather pragmatic aspects, supporting that the pragmatic perspective contributes to a superior understanding of successful expatriation.

5 Conclusion and Implications

This study has aimed to bring insight into the successful management of expatriation in Innovation Norway and ConocoPhillips. The aim of this last chapter is to conclude the thesis and answer the research questions:

The academic literature contains a series of recommendations for successful expatriation: To what extent do the actual experiences of the largely successful expatriates in our two case companies deviate from these ideals? Are potential deviations best understood in terms of a cultural or pragmatic perspective?

The purpose of this thesis was two-fold. We first sought to identify deviations from the recommendations for successful expatriation described in the expatriate literature. Secondly, we use the two perspectives, the cultural and the pragmatic, to see which of them better describes the deviations, and hence contributes to a superior understanding of successful expatriation.

We have found that the reality in Innovation Norway and ConocoPhillips deviates from the academic ideals on several aspects throughout the Expatriation Cycle. However, both case companies are still able to achieve successful expatriation. We found that both case companies needed to be more proactive in all three stages of our Expatriation Model, to accommodate the different needs of their expatriates and how the needs changes over time. Our recommendations in Chapter 5.1.1 can improve the expatriation management in both Innovation Norway and ConocoPhillips, which eventually will help the respective companies benefit more from expatriation.

We found that the major deviations relate to: contact and support from HR, culture shock, spouse and dual-career, repatriation, and leveraging skills, knowledge and experiences. In the following chapter we will elaborate on the implications our findings have for HR management and the literature.

5.1 Implications for HR Management

Finding that the pragmatic perspective contributes to a superior understanding of successful expatriation have several implications for HR management. Today, many companies focus on both the cultural and the pragmatic perspectives in their expatriation management, and face several challenges in the process. Rather than performing poorly on either perspective, our research suggests that HR management should focus on the pragmatic aspects of expatriation.

We found a need for additional support throughout the Expatriation Cycle. Today, many companies, including our case companies, offer extensive preparation and training programs *before* the IA. This extensive focus needs to continue once the expatriates are abroad, through regular contact and support for both the expatriates and their families. This entails a focus on creating a package that contain work for the expatriate, housing for the family, schooling for the children, and activities for the spouse. For dual-career this also entails that arrangement for the spouses' working situation should be included.

More attention should also be given to the repatriation process, to make sure that the expatriates enter a new position appropriate for their new skills, knowledge, and experience acquired abroad. By connecting the IA in a coherent career path for the expatriates, companies will be able to leverage more from their expatriates upon repatriation, and hence extract more of the benefits from expatriation. Being more proactive and supporting the expatriates and their families throughout the IA can help detect any issues or problems early in the process, and HR can implement measures to avoid them to escalate further. The next section includes specific recommendations and measures for our two case companies.

5.1.1 Recommendations

Our suggestions follow the stages of our Expatriation Model, and are based on the findings of deviation from the recommendations in the literature and advice from Andersen at ASC.

Stage 1: Pre-departure and Relocation

The attitude and motivations for expatriation seemed to be healthy in both case companies, leading to potential candidates applying for an IA. However, both case companies need to work on the glass ceiling that hinders the expatriates to take the leap and applying for IAs. For Innovation Norway this means working on the attitude that

anyone can apply for an IA, and that one's do not need to be recommended or asked. We suggest that Innovation Norway implement an HR tool for mapping their employees, as it will give them a better overview of their workforce, and also what capabilities, skills, experience, and future plans they have. ConocoPhillips had this type of HR tool with the IDP, helping them with several aspects of managing the expatriation process. However, we did not find any evidence of the IDP connecting their employees' current position with a potential IA and a future position, which would make the IA a part of a coherent career plan. As the system already is in place, ConocoPhillips only needs to make minor changes to achieve this. If the case companies manage to connect the IA with an overall career path, they might be able to extract more of the long-term benefits of expatriation, and their expatriates can benefit from a more secure future. This could also make more candidates apply for IAs in the future.

Both case companies focused on purely pragmatic aspects in their selection process, which we argue works well as neither of the companies reported on any significant failure rate among their expatriates. Andersen (2013) pointed out that the expatriate can learn cultural sensitivity. How well potential candidates score on culture will always come second hand in the selection process with an urgent business need abroad. This indicates that the pragmatic perspective contributes to a superior understanding of what creates successful expatriation during the selection process.

Innovation Norway has an extensive history of external expatriates. We argued that Innovation Norway should hire more internal candidates, to be more confident of their competence and loyalty to the company. As a small company they know most of their internal candidates, and should therefore be certain that they are able to get an equally comprehensive understanding of the external expatriates' skills and knowledge during the selection process. Eventually this will affect the preparation and training process, which might entail more detailed preparations for the external candidate, as we will come back to shortly.

None of the case companies include the families in the selection process, which we found natural as we argued that the expatriates have the skills and knowledge to perform their work regardless of their families. Andersen (2013) argues that it will be difficult bringing the spouse on an interview, but if all else is equal, the family can be a

deciding factor for the success of the IA. By including the families in the selection process the case companies risk shifting the focus away from the selection criterion and on to other irrelevant factors, when searching for a candidate with the right skills for the IA. We therefore argue that the selection process should be solely focusing on the *expatriate* as it is the expatriate that will complete the task of the IA. With this said, the families should be included in the first meeting of the preparation and training process when the expatriates *are* selected for the IAs. All expatriates know that they have to bring up their family situation at one point. Instead of having a negative focus on the family situation, it should be brought up early in the process after selection to proactively accommodate the families on the IA.

Among our small sample of expatriates we had three examples of dual-career couples, an aspect that was given little attention from the case companies. One can argue that only a few couples are eligible for an IA *and* work for the same company. A lack of focus of this matter may cause the case companies losing highly qualified candidates, and in the long run lose potential benefits of expatriation. We will not suggest for the case companies to include dual-career issues in the selection process for reasons expressed above, rather that they deal with dual-career couples on an ad-hoc basis if the expatriates set demands in the selection process. If not, a potential dual-career IA should be initiated early in the preparation and training process. The case companies can map potential options to accommodate the spouse. This does not necessarily entail that the spouse will be given a position abroad as it is not always an option. The case companies will still face the risk of dual-career couples demanding that the spouse's work situation is sorted out during the selection process. We argue, however, that the process of finding potential options for the spouse would be easier with the right HR tool in place.

We found that both case companies have room for improvement in the preparation and training process. However, as some of the expatriates are sent abroad rather quickly, it can be difficult to go through all the necessary steps of the process. We believe that a better connection between the IA and a more cohesive career path can decrease this problem. However, there will be natural exceptions, due to urgent business needs and projects abroad. An HR tool can also help here, indicating any needs for technical training. The solution is not that easy for Innovation Norway, who will then have to do this type of mapping during the selection process for their external expatriates.

From a pragmatic perspective we found that the expatriates' previous experiences were related to the level of preparation for the position abroad. The expatriates with the longest experience within the respective companies seemed to be more prepared for the IA, than the expatriates who were rather new to the companies. To overcome this, we suggest that Innovation Norway gives the external expatriates a more thorough preparation with regards to running an office abroad. In addition, we found that none of the expatriates were prepared for the relation towards the embassy, indicating a clear need for more formal preparation and training. This could be done through formal classes or simply by connecting the expatriates to former expatriates who can share their experiences. With this sorted out we believe that the expatriates would become operative more quickly, and hence solve the startup problems we found.

From a cultural perspective, both companies prepare their expatriates through courses provided by ASC. Even though supporters of the cultural perspective argue the importance of cultural training, as presented in Chapter 2.3, we found little or no evidence supporting the need for it. We found that those who did *not* go through the cultural training seemed to manage just as well as those who had the training, as long as the pragmatic aspects were in place. We argued that this could be related to the personalities of the expatriates, as they were all open-minded. The culture course is based on a belief that success of an IA is dependent on professional skills, the employees' ability to gain entry into new surroundings, and how well the family adapts. We have argued that both the professional skills and how well the families are able to create a life abroad are pragmatic aspects, and not related to the host country culture. The course offers valuable insight to life abroad, but we argue that much of what can be gained from the cultural course is knowledge that the case companies already have within the organizations. As a result, we question the need for the cultural training, and whether the resources could be allocated instead to pragmatic support throughout the Expatriation Cycle. We therefore suggest that the case companies use former expatriates for this type of knowledge transfer, as they have first-hand experience on how life as an expatriate is.

Another aspect of the cultural preparation is language courses. On the IAs, all the expatriates managed with their high English proficiency levels, and with the use of interpreters if needed. Our interviewees that took language courses had to quit for

different reasons, but overall it seems like the effort and cost outweigh the benefits of knowing the language. This can be related to the short-term strategic planning that was seen in both case companies when it comes to expatriation. With more long-term planning, language courses could have been initiated much earlier, and the expatriates might have benefitted more from them.

With regards to HR, we found that Innovation Norway lack local knowledge due to their centralized HR system. This indicates a need for increasing the knowledge base about the different locations abroad to sufficiently prepare their expatriates. The problem is opposite for ConocoPhillips, who have the local knowledge in their decentralized HR system. However, they need to improve the coordination and communication between their HR divisions to provide the best possible preparation for the expatriates.

Regardless of the type and level of preparations and training, it is only preparation and thus limited. As Andersen (2013) puts it, the expatriates can be given the tools before they leave, but once they are abroad they need to live it. Throughout the training and preparation process we see the pragmatic perspective contributing to a superior understanding of how to manage expatriation, and that cultural aspects of training at best can act as supportive means.

Stage 2: Operative

For many of the expatriates, moving abroad was the first obstacle. A moving process is stressful, and we found that both case companies were very supportive during this process. However, after the expatriates and their families have arrived in the host country, the support from HR seemed to fade away. This could be experienced as an anticlimax for the expatriates, who could feel like they are left alone dealing with the issues and challenges they face abroad. We argue that follow up and contact should start early to proactively accommodate any issues that may occur. When the expatriates are not followed by HR when abroad, the companies also lose control of the strategic aspects of the IA. Also, not asking how the expatriates are doing or how the work are going might lead to small problems escalating into major situations, like it happened for CP 4. This finding indicates an additional need for support and follow up for expatriates working on rotation. The stress and isolation abroad might be harder for expatriates working rotation, as the expatriates do not have their families to rely on abroad.

One of the main problems in both case companies is a missing structure indicating who is responsible for following up with the expatriates, as both companies have multiple actors involved. The contact could be kept through e-mail or phone, and should be on a regularly basis throughout the IA involving both the expatriates and their spouses. We argue that it should be agreed upon beforehand to accommodate individual needs.

We argue that mentoring can help ease the need for follow up by HR, as a mentor can help the expatriates dealing with problems or issues. However, it is important that the mentor is an objective party. Both Andersen (2013) and the expatriates were positive to mentoring and the benefits of it. As none of the case companies have any formal arrangements for mentoring, this is an aspect we highly recommend them to look into. We found that the expatriates initiated informal mentor relationships, including managers and regional directors. However, we argued that the informal mentoring is in conflict with the objectivity mentoring should ideally be based on, which can lead to problems with raising issues related to their managers. Instead we recommend that former expatriates could be used as mentors. Including mentoring as a part of the expatriation package can secure that the expatriates receive support in the preparation and training process from a mentor who has experienced the same situation, whereas the expatriates themselves give back to future expatriates once they have completed their IAs and settled back into the home country.

We found that little was done to accommodate the trailing spouses, even though ConocoPhillips have some policies for them. Often the trailing spouses have the main responsibility for the family abroad, but in addition to running the house hold the spouses need something to keep them occupied abroad. Both companies can do better research on activities the spouses can undertake in the host country, whether it would be education, volunteer work, finding a position abroad, or social network they can enjoy. This should be a simple gesture that can make the life of a trailing spouse much more meaningful abroad. We suggest that both case companies set up a network for the trailing spouses and families, where the trailing spouses can socialize and share experiences with other spouses. This can be done online or in person in areas where there are a many expatriates. IN 2's spouse is an excellent example of such a network, as the spouse initiated social events for the trailing spouses in the area.

To overcome the limited expatriate experience among the HR representatives we argue that they can benefit from a visit to the host countries. HR in ConocoPhillips expressed a desire to see how the expatriates lived and work abroad. We believe this could be beneficial for both case companies, and that this might help overcome the problems related to their centralized and decentralized HR systems. However, visits to the host countries will be resource demanding. We therefore recommend that the visits should focus on areas where the case companies frequently send expatriates.

The follow up and mentoring is supporting the pragmatic perspective, and with these aspects in place we argue that many of the expatriates will deal better with problems when abroad. We found that none of the expatriates encountered culture shocks, and as long as the pragmatic aspects were in place, they all managed to create a meaningful life abroad. This finding leads us to reject our first assumption that the cultural perspective is an important criterion for successful IA, and again we find evidence of the pragmatic perspective being superior to the cultural perspective.

Stage 3: Repatriation

Both case companies manage the relocation process of the expatriates and their families quite well. The practicalities with moving are dealt with, and the expatriates are able to adjust their repatriation process in time for the children's education. The problems in the repatriation process are connected to the lack of a cohesive career plan for the expatriates, and a lack of creating realistic expectations in the process. As the IAs are not connected to the next career step, the case companies are left with solving this on an ad-hoc basis. For Innovation Norway this is difficult due to the struggles with finding new appropriate positions for their returning expatriates. For ConocoPhillips the struggle is to find a new position that can be connected to the management development strategy. The problems with finding relevant positions will also cause struggles with leveraging the benefits of expatriation in both case companies. Andersen (2013) suggests helping the expatriates see their competence, and match it with the competence needed in the companies, to ease the process of finding a new position.

Changes in employment are difficult to foresee, which is likely to persist even with appropriate measures. We argue that looking into the career planning for all the employees in the respective companies can help ease the repatriation struggles.

ConocoPhillips does this to some extent with the original managers being in charge of finding a new position. In addition, they have the yearly performance appraisal and the IDP where they discuss the employees' next career move. This is the only evidence of the companies working on creating realistic expectations in the repatriation process. As we still found expatriates who struggled with repatriation to a desirable position, and instead ended up in a similar position as before the IA, we argue that there is still room for improvement. Innovation Norway needs to implement an HR tool to foresee the employment changes. Then both case companies can use their HR tool and connect the expatriates' career path to changes or desire of movement in other areas of their company. The optimal situation would then be that the movements would add up to better positions for the returning expatriates, in addition to a better overall career planning for all their employees. An additional suggestion could be to elongate or cut IAs short to accommodate any vacancies in the home country.

With a position that is related to the expatriates skills and experience, the case companies are also better able to leverage the benefits of expatriation. Regardless of which level the expatriates returns to, both case companies can do a better job in aligning the new position with the new knowledge the expatriates have gained abroad. Much of the struggles in the repatriation process could be solved by remaining in regular contact with the expatriates throughout the IA. The case companies would then have a better understanding of the skills, knowledge, and experiences they have gained abroad and hence also be better equipped to leverage it upon return.

With regards to the adaption back into the home country culture we found that all of the expatriates managed this process quite well, and we found no evidence of any reverse culture shock. Andersen (2013) suggested that expatriation would be easier than repatriation, due to the extensive focus in the preparation process, and the lack of attention in the repatriation process. However, our interviewees had mixed opinions on which transition was easier, which lead us to a situation where we can neither confirm or reject our third assumption that expatriation would be easier than repatriation.

We recommend the case companies to implement a debriefing with their expatriates and their families, as none of them have a similar arrangement today. By talking to the expatriates and their families a few months after repatriation, HR could gain valuable

knowledge on both the positive and negative experiences their expatriates had during the process. Firstly, this knowledge should be used to help the expatriates and their families with any problems they may have after repatriation. The debriefing can be seen as a closure for the IA, where important aspects like the new position, the children's education and the spouses' work situation should be given attention. Measures could be implemented to improve any problems or issues. Secondly, the information could be used to improve expatriation management, to actively prevent any issues occurring in the future. Lastly we can say that we found that there is a need for more support from HR throughout the entire Expatriation Cycle, confirming our second assumption.

5.2 Implications for the Cultural and Pragmatic Perspectives

We presented the expatriate literature in two perspectives, where the cultural perspective argues that culture matters in the international context (Hofstede & Hofstede, 2005; Trompenaars & Hampden-Turner, 1998), while the pragmatic perspective argues that other conditions are of greater significance for expatriation (Neyer & Harzing, 2008). This study contributes to the existing expatriation literature, as we disclosed some of the "secrets" of successful expatriation. Our analysis and discussion have tried to increase academic and practitioner understanding of the expatriate literature, where our findings support that the pragmatic perspective contributes to a superior understanding of successful expatriation.

Our main finding is that both case companies are able to achieve successful expatriation, given that the expatriates find their work meaningful, the living situation abroad is good, while support is given to their families. Through the research we have found little evidence supporting the cultural perspective. We are not rejecting the importance of culture in an international setting, rather indicating that culture is better used as a supportive means in the expatriation process. We argue that expatriates are able to manage well in an international context, as long as the pragmatic aspects are taken care of. It is important to notice that the perspectives are not mutually excluding, and that both can be prominent depending on the context.

Our thesis is promoting a pragmatic view on expatriation. This is criticizing the cultural perspective which emphasizes the importance of understanding culture to function well abroad (Varner & Palmer, 2005; Neyer & Harzing, 2008; Li, et al., 2013; Hofstede, 2013).

Our thesis is not rejecting that an understanding of the host country culture and ways of adapting to it is a part of expatriate success (Varner & Palmer, 2005), but rather downplaying the role of culture to achieve success as we found that expatriates are able to live meaningful lives abroad without adapting to the culture.

Our research offers support for Christensen and Harzing's (2004) argument that many IAs does not follow the ideal Expatriation Cycle, as we found several deviations from the recommendations given in the academic literature compared to the actual experiences of our sample of largely successful expatriates. Instead we have developed a three stage Expatriation Model, Figure 3, which divides HR support into three different stages, with different pragmatic aspects for HR to focus on along the way.

We also question Ferraro's (2006) argument that all people go through the different stages of the Culture Shock Model. We found that some of the expatriates had an initial feeling of excitement and euphoria, but mostly these symptoms were downplayed by the stress caused by lack of solutions for pragmatic aspects such as the living situation. The evidence we found that could imitate the movement in the Culture Shock Model was basically caused by pragmatic aspects such as differences in climate and not the culture in the host country. We also question the basis of Andersen's (2013) reverse culture shock, which is mainly based on the pragmatic changes upon repatriation and not the home country culture as such. All the expatriates were able to adapt easily back into the home culture, and most were rather glad to be back.

Another contribution of our research is to raise the question of need for cultural training before the IAs or if the resources are better allocated on pragmatic support throughout the IAs. We also question if the cultural training provided by ASC in reality contains just as much pragmatic as cultural aspects. A lot of the course contains pragmatic help in form of adjusting expectations, giving advice for health care, schooling, and activities for the trailing spouses. The course also contains introduction to cross-cultural communication and international custom with the focus on an international context, and not the individual cultures as such.

Overall we argue that the recommendations on pragmatic aspects in the academic literature should be given more attention, and be further developed in research.

5.3 Conclusion

The findings in this thesis supports evidence for the case companies' ability to achieve successful expatriation, even with several deviations from the recommendations provided in the expatriate literature. None of the deviations we found were severe enough to affect the success rate, rather indicate room for improvements to ultimately increase the leverage of the benefits of expatriation. The "secrets" of successful expatriation is best understood in terms of a pragmatic perspective, as the expatriates are able to manage well in an international context, as long as the pragmatic aspects are in place. We found little evidence supporting the cultural perspective, and conclude that it is better used as a supportive means in the expatriation process.

5.4 Limitations and Further Research

We acknowledge that our research has a number of limitations that future research should address. The most important of these is that the limited number of expatriates we have interviewed and the limited number of companies in which we have conducted our research. However, we argue that future research should follow our lead by including companies that are different in terms of parameters such as nationality, industry and staffing strategy. This enhances generalizability, and can further increase academic and practitioner understanding of the expatriate literature.

One possibility is to increase the sample size of interviewees, as we had a rather limited number of expatriates in our sample. Ideally this should be done by conducting qualitative research, but it could also be done using a quantitative approach. Another possibility is to increase the number of cases. Multiple cases enable replication, where the cases independently can confirm any emerging constructs or propositions. This enhances generalizability to a larger group of companies or industries as a whole.

This study focused on finding which perspective contributed to a superior understanding of *successful expatriation* based on the deviations from the academic recommendations. It would be interesting for future studies to look into which of the two perspectives contributes to a superior understanding of *expatriate failure*, to see if such a study will produce a similar conclusion.

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7 Appendix

7.1 Contacted Companies

Name	Date	Answer
Jotun	October	Rejection January
Odfjell	27.12.12	Rejection 02.01.13
DNV	28.12.12	Rejection 03.01.13
Statoil	08.01.13	
Hydro	30.12.12	
Total Norge AS	28.12.12	
Aker Solutions	30.12.12	Rejection 21.01.13
Seadrill	27.12.12	
Wilh. Wilhelmsen Holding ASA	28.12.12	
Schlumberger	27.12.12	
Schibsted	28.12.12	Rejection 03.01.13
A.T. Kearney	30.12.12	Rejection
PWC	28.12.12	
KPMG	27.12.12	Rejection 02.01.13
Innovation Norway	07.01.13	Positive 10.01.13
UD	08.01.13	
Sjømannskirken	08.01.13	
Global Expat Services AS	15.01.13	Positive 16.01.13
COWI	16.01.13	
Nestle	16.01.13	
Statkraft	17.01.13	Rejection 18.01.13
Elkem	17.01.13	Rejection 17.01.13
ASC	17.01.13	Positive 17.01.13
Conoco Phillips	17.01.13	Positive 21.01.13
ABB	17.01.13	
FMC Technologies	7.01.13	

7.2 Interview Guide, HR

1. Background of the interviewee

- Education
- Work experience home/abroad
- How many years have you worked with HR and expatriation?
- Do you have any work experience abroad yourself?

2. General information about usage of expatriates

- What is the number of expatriates in your company?
- How do you separate between short-term and long-term assignments?
- Are there any criteria regarding the length of stay?
- How many inbound expatriates do you receive from other countries to Norway?
 - Which countries do they come from?
- How many Norwegians are currently abroad?
- How many expatriates' returns in an average year?
- In average, how long does an IA last?
 - Both short-term and long-term?
- Do you see any trend in the way you use expatriates today?
 - Is the number increasing, stable or falling?
 - Are there any differences in the use of short-term vs. long-term assignments?
- What is the cost of an expatriate in relative terms compared to an employee in Norway?
- What are the failure rates of expatriates?
- What are the most common reasons for failure?
- How many end their assignments before it is completed?
- What is the turnover rate among expatriates?

3. Expatriates as a part of strategic planning

- What is the main function of an expatriate?
 - E.g. position filling, organization development or management development?
- What are the main reasons for using expatriates?
 - Are they used for control, knowledge transfer, development of international business skills etc.?
- Does the company have any strategic plans for the use of expatriates?
 - How does this plan go together with the general international strategy?

4. Selection of candidates

- How is a typical selection process for expatriates in your company?
- Are there any criteria regarding skills etc.?
 - If yes, what?
- Do you consider cultural skills in the selection process?
- How would you describe a typical expatriate?
 - Any special personal traits?
- Do you perform any form of screening to find potential candidates for expatriation?

- If yes, how many of them do typically go abroad?
- How is the general attitude towards expatriation in your company's culture?
- What would you say is a typical motivation to go abroad?
 - Does the employee's motivation play a role in the selection?
 - Are any expatriates sent abroad because they want to themselves?
- Do you encourage any employees to go abroad? Why?
- Do the employees have the opportunity to visit the host country before accepting an IA?
 - If no, could you consider introducing this practice?
- Are you ever sure that the selected candidate will complete the entire IA?
- How is the family situation considered in the selection process?
- Are there any employees turning down an IA in the selection process?
 - What might be the reasons for that?
- After a candidate has been chosen, how long time do they typically have before they are sent abroad?

5. Preparation/training of the expatriate

- How does a typical preparation process look like before an IA?
- What steps do you as HR do in the preparation?
- What does pre departure training typically involve?
 - Skills, culture, language etc.?
- Are there any adjustments to the training depending on where the expat is going?
- How is the family involved in the preparations/training?
- Are expats sent abroad directly on a long-term assignment or do you use short-term assignments as tests?
 - Have you considered sending them on shorter stays as training/preparations for a long-term assignment?
 - Could you see any benefits or drawback with this type of practice?
- Do they get any additional training after arriving in the host country?
 - If yes, what does this involve?

6. Follow up of the expatriate

- What is your role as HR when the expat is abroad
- What is done to follow up the expats abroad?
- How is communication with expats handled?
 - What events/changes in the home office are they informed about
- What do you feel the expat expect of you when they are abroad?
- Are any dissatisfied with the follow up you are providing? Why?
- What type of problems do expatriates typically need help for when they are abroad
- Do you have any mentor arrangements for expats while they are abroad
 - If yes, what are the typical tasks of a mentor?
- What happens if the mentor quits or moves jobs when the expat is abroad
- How is the compensation package for expatriates
 - Does the family get any compensation?
- Have anyone extended his or her stay after the assignment was supposed to end?
 - What happened then?

7. Family abroad

- How do you handle a family accompanying an expatriate abroad?

- How is the work situation for a spouse?
- Daycare/school for children?
- Would you say that the family means anything for the success or failure of the IA?
 - In what way are they helping/destructive?

8. Repatriation of the expatriate

- How does a typical repatriation process look like?
 - When does it start?
- How do you solve the career path for returning expatriates?
 - When do you start preparations for return to a new job?
 - Are expatriates generally pleased with the offer they get?
- How is the expat welcomed to make sure that they adjust back into the work environment?
- What is done from the management to get an understanding from the experience and knowledge of your returning expatriates?
 - Do you see any room for improvements?
- What is done to help the expatriates make sense of their experiences?
- What is done to utilize the expats new knowledge, and to apply it back into their new jobs?
 - If not, what do you see as areas of improvement to enable this knowledge transfer?
- Are former expatriates invited to share their experience and cultural knowledge to other employees?
- What do you consider to be the main issues in readjusting to the Norwegian culture?
- How do you support the family upon return?
- What do you do to avoid turnover in the repatriation process?
- When do you consider the repatriation process to be over?

What are the major benefits for the company by using expatriates?
Do you think these could be accomplished with any other staffing strategy?

7.3 Interview Guide: Expatriates

1. Background of the interviewee

- Age?
- Education?
- Which languages do you speak?
- Work experience home/abroad?
- Abroad assignment, where and when?
- What was your position abroad?
- What is your position today?

2. The selection process

- How is the general attitude among the employees for taking on IAs?
- How did you get information about the vacant position abroad?
If applied: What was your motivation for applying?
 - If headhunted: Have you shown any interest for going abroad before?
- How was the interview process?
 - Any special challenges?
 - Did you go through any psychological tests?
 - Did they require any skills regarding cultural knowledge and language?
- What do you think is the reasons for you being selected for the IA?
- Were there any factors against taking on the IA?
- How did your spouse/family react on the selection?
 - Did they accompany you on the assignment?

3. Preparation and training

- After you were selected, how long time did you have before you went abroad?
- What type of preparation/training did you receive before going abroad?
 - Did you get any language and/or cultural training?
 - Was your family included in this?
 - If not, what preparation/training did they receive?
 - Do you feel the training was adapted to the area you were going to?
 - If not, do you think that would have been helpful in any way?
- Do you feel you were sufficiently prepared before going abroad?
 - If not, what was lacking?
- Did you have the opportunity to go on a shorter stay as training before IA?
 - If no, do you wish you had the opportunity?
- Did you receive additional training once you arrived abroad?
 - What then?
 - If not, do you think you could have benefited by that?
- What were your expectations before you travelled abroad?

4. The period abroad

- How was the experience of arriving in a new country?
 - Did anyone greet you once you arrived?
- How was your living situation?
 - Did you live with locals or in a gated community for expatriates?
- Did you experience any challenges upon arrival?
 - What about culture shock, did you experience that? Please explain.

- Did you feel that there were any differences between the cultures?
 - Did you encounter any difficulties because of culture?
- *How did your family handle the cultural differences?*
- Would you say that there are any differences in values, norms and traditions?
 - How did this play out?
- How was interaction with nationals outside work?
Both regarding you and your family.
- *How was your spouse's work situation?*
 - *Did your spouse get any support from your company to find a job?*
 - *How was the children's situation with regards to daycare/school?*
- Did you feel that you ever fully adjusted to the new environment?
 - How long time would you say it took?
- *Were you pleased with the assistance your family received?*
 - *Do you think your spouse would say the same?*
 - *If not, are there any special reasons?*
- What were your main personal challenges on the IA?
- How was the contact with family and friends back home when you were abroad?

6. Performance measurement

- Did you feel you could use your knowledge and management style abroad, or did you have to adjust it to the new environment? What did you do?
- What would you say is your biggest achievement in your IA?
 - Any major lessons learned?
- Do you think it was necessary to use an expatriate for your position, or could a local have done the job?
- Was the length of your stay long enough to feel you accomplished what you wanted?
 - Would you have wished to stay longer? Why?

5. Follow up of the expatriate

- What type of follow up did you expect to get when you were abroad?
- What follow up did you actually get from your home office?
 - Are you pleased with the follow up you received when you were abroad?
 - If not, what could have been done differently?
- A popular trend in expatriation is to use mentors; did you have one from home- or in the host country?
 - If yes: What did they help you with?
 - Was there a change of mentor during the abroad assignment?
How did that work?
 - If no; did you miss a mentor? Do you think a mentor could have helped with minimizing challenges you faced?
- How was the communication from your home office?
 - Were you informed about happenings at home office?
 - Did you have contact with your colleagues at home?
- How were you greeted in the host company?

7. Repatriation

- When did the repatriation process start? Approximately.
- What were your expectations to your company upon return to Norway?
- What did the repatriation process involve for you?
- What about work prospects, did you have a position to come back to?
 - Was it the same position as you had before the IA, or did you get a new one?
 - Is there anything you think could have been done differently to make the transition easier for you?
 - If no, did you consider finding a job in a different firm?
- Did you experience any challenges upon return to Norway?
 - *How was it for your family?*
- Would you say you experienced any symptoms of reversed culture shock?
- In what way can you utilize your new knowledge in your new position?
 - How did the company welcome your experiences and new knowledge?
 - What do you think the company could have done to better leveraging from your experiences and knowledge?
- Do you feel your knowledge and experiences are valued now? Why not/how?
- The compensation package you received for the IA, do you feel it is sufficient?
 - If not, what is missing/could be better?
- Would you share your experiences with future expatriates if you had the opportunity?
 - Do you think you could have benefited from that before you went abroad?
- Which transitions do you think was the easiest, going abroad or coming back?
- Would you consider going abroad again on another IA? Why, why not?

How was your experience compared to your expectations before going abroad?

Do you feel you know more now than before you went abroad? In what way?

7.4 Interview Guide: ASC

1. Background of the interviewee

- Education
- Work experience home/abroad
- How many years have you worked with expatriation?
- Do you have any work experience abroad yourself?

2. General information about use of expatriates

- How many expats participate in your training classes?
- How would you separate between short-term and long-term assignments?
 - Are there any criteria regarding the length of stay?
- On average, how long does an international assignment last?
 - Both short-term and long-term?
- Do you see any trend in the way companies use expatriates today? I
 - Is the number increasing, stable or falling?
 - Are there any differences in the use of short-term vs. long-term assignments?

3. Selection of candidates

- How would you describe a typical expat?
 - Any special personal traits?
- Do you have any recommendations for companies who want to be better in the selection process?
- What would you say is a typical motivation for going abroad?

4. Preparation/training of the expats

- How long time would you say is needed for preparations and training before departure?
- How constitutes a typical preparation process prior to an assignment?
 - What steps would you recommend to include in a preparation process?
- What type of courses do you offer expatriates?
 - What do these courses typically involve?
 - Skills, culture, language etc.?
 - Are there any interactive parts of the course?
- Are there any adjustments to the training depending on where the expat is going?
 - Would you say that is important or could a general class be enough?
- How is the family involved in the preparations?
 - Is there any special training for spouses/kids?
 - How early in the process would you recommend to involve the family?
- What are your thoughts on using short-term assignments as preparations for long-term assignments?
 - Do you see any benefits or drawback with this type of practice?
- What is your view on additional training after arriving in the host country?
 - What type of training do you think is beneficial?
- Is there any difference in training if the person has been abroad before? How?
- What feedback have you got from past course participants?
- How do you ensure the training is up to date on current situations?

5. Repatriation

- When, approximately, should a repatriation process start?
- What steps should a repatriation process involve?
- What type of support is typically given?
 - Do you offer any courses for returning expats?
 - What is the focus of these classes?
- Do you see any areas where companies normally do not follow through in the repatriation process?
 - Do you have any specific suggestions in mind?
- What should be done to make the expat feel at ease when returning into the Norwegian work environment?
- What can be done to minimize the reverse culture shock?
- How can the home company utilize the new knowledge and experience the expat have gained through the period abroad?

6. Follow up of the expat

- How should their home company follow up an expatriate while they are abroad?
 - How is the typical communication with an expat abroad?
- What do you think the expat expect of their home office when they are abroad?
- What type of problems do expats typically need help for when they are abroad?
- What are your thoughts on the practice of using mentors?
 - What are the typical tasks of a mentor?
 - What happens if the mentor's employment situation changes or is no longer relevant, while the expatriate is abroad?
- What should a compensation package include?

7. Family abroad

- Do you have any advice for expats travelling with their spouse/family?
- Do you see family issues as part of expatriation failure?