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MASTERS THESIS:
EXPATRIATION AS A CAREER EXPERIENCE



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PERSONAL DECLARATION

I, the undersigned, Zelda Pieters, hereby declare that the work contained in this thesis is my own original work and that I have not previously, in its entirety or in part, submitted it to any university for a degree.



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ABSTRACT

This investigation explored the unique experiences of expatriates who have taken the proverbial first step into the novel and unknown. The main purpose of this study was to bring to the fore the importance of these experiences in a human resources management context. Through the application of the qualitative research methodology based on grounded theory, these experiences were unearthed, analysed and discussed. Various personal and contextual factors that contributed to the experience of success were identified and further elucidated. This study ultimately illustrated the need for organisations to develop adjustment programmes that would assist the expatriation process to provide insights and skills that could empower the individual to achieve true personal fulfilment in pursuit of career success.

Hierdie studie het die unieke ervaringe van individue ondersoek wat die besluit geneem het om die onbekende weë van nuwe burgerskap te betree. Die hoofdoel was dan om die belangrikheid van hierdie unieke ervaringe binne die konteks van menslike hulpbronne bestuur te plaas. Deur die toepassing van die kwalitatiewe navorsingsmetodologie met gegrondteorie as uitgangspunt, word hierdie persoonlike ervaringe van emosionele beroepsukses van naderby beskou, ontleed en bespreek. 'n Breedvoerige bespreking van die persoonlike en kontekstuele faktore wat bydra tot suksesvolle aanpassing is toegelig. Hierdie bevindinge kan organisasies in staat stel om beter aanpassingsprogramme saam te stel, asook om individue te bemagtig met die nodige insig en vaardighede ten einde persoonlike groei en beroepsukses te verwesenlik.

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Dedication

This paper is dedicated to my late mother, Elizabeth Beukes, for her influence in my life and instilling the significance of a continuous quest for knowledge.

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CHAPTER 1

INTRODUCTION

1.1 EXPATRIATION IN THE CONTEXT OF MODERN SOUTH AFRICA

South Africa has a developing economy. Traditionally, this economy was heavily reliant upon mining and agriculture. The movement into industry took place slowly and it can possibly still be said that as an open market economy it has just arrived. Certain sectors such as the construction and monetary industries have seen quite rapid developments since 2003.

It is possibly only since 1994, after the apartheid era and the international isolation of that era, that international trade reopened for South Africa. Mining, agriculture and international isolation meant that few South Africans considered employment in other countries. Apart from the localised nature of mining and agriculture and the fact that South Africans were not welcomed abroad, South Africans had a very local outlook on employment.

Until Apartheid was disbanded white males almost exclusively occupied the majority of managerial and highly skilled positions. White people, especially white Afrikaners, were traditionally nationalists who idealised the country as theirs. They showed a special affinity to whatever is rural and many dreamt of owning farmland away from the major cities. Ownership of land has always been idealised as a feature that binds people to this land.

Although industrialisation has led to rapid urbanisation of all races, the ownership of land in some rural areas, even homelands were considered a very important feature of one's identity as a South African. Movement out of one's hometown for employment to another city or town in South Africa was possibly the only movement many persons considered in their career planning. South Africans of all races have always been very family orientated. Historically

blacks have had themselves firmly defined in the context of the extended family.

Unfortunately, through the atrocities of economic and political exploitation, many generations of people have lost a positive identity in South Africa. For many years they were considered second-class citizens whose movements were restricted by pass laws and poverty. Few of them had the opportunity to rise above manual labour status.

South Africa was in a grip of total isolation. There were a few exceptions of people who were able to make a success of their careers in other countries. Such persons were limited in number, so few that it actually confirms the "rule" that South Africans do not easily emigrate. International sanctions exacerbated the situation at all levels of the macro- and micro-economy.

In 1994, with the disbanding of the African National Congress (ANC), the release of Nelson Mandela and South Africa holding its first democratic election, political changes set in and the doors to the outside world were rapidly opened. Policies of Affirmative Action and Black Economic Empowerment (BEE) expedited the process of economic growth, facilitating the movement of previously disadvantaged individuals into positions of management, across all levels and economic sectors. Not only did the doors open locally, but also many opportunities became available to find employment overseas. In fact, many international businesses and institutions recruited actively in South Africa. Employment categories that were targeted were nursing, medical doctors, teachers, engineers and the security industry. South African industries actively explored world markets as new sources of investment.

Young people grasped the opportunities to work and travel overseas before settling down into more stable career paths. Nelson Mandela's charismatic personality seemed to create an aura of opportunities for the Rainbow Nation. Although the economy has seen growth, there were a few factors that slowly eroded this era of hope and opportunity and have impacted people's lives in

one way or the other. These factors include but are not limited to safety and security concerns, the introduction of employment equity guidelines and the broad based black economic empowerment initiatives.

The few years into democracy were characterised by disappointments and poor service delivery. Pronouncements about health and security issues, or the lack thereof, have led to signs of despondency and pessimism about South Africa's future. Mounting crime, fraud and conflicts about badly administered affirmative action policies have made persons, especially white skilled persons, become pessimistic about their and their children's future. Even Coloured and Indian persons have expressed concern about being viewed as "not black enough" when applying for work. One of the major factors that changed the climate of optimism was the policies and practices of the ruling Zimbabwean government. Whites' land was expropriated and they were treated very harshly. Having lost faith in their own president and many of their cabinet ministers, South Africans have begun to wonder if South Africa was also on its way to become another African state characterised by chaos, corruption and conflict. Increasing numbers of people, especially the white skilled and semi-skilled, have begun to emigrate to Canada, Australia and New Zealand. The United Kingdom, with its strong currency and relative similarity to South Africa, has become an attractive destination for young qualified people to explore job opportunities and to earn foreign currency.

On the positive side, seizing opportunities to expand one's personal and economic horizons have led South Africans to find new careers in foreign countries. Whatever the reasons for making a decision to emigrate, it was never going to be an easy step.

The South African economy has not escaped the influence of globalisation. This in itself has become a driving force behind people moving across local and foreign boundaries. It is, also appropriate to take note of how companies have adjusted to the trend of moving workers, materials and systems across international boundaries.

Baruch (2002) found that the expatriate population is expected to increase in future as globalisation spreads. Career paths in multinational corporations will include posts abroad as a crucial part of the development process for the managerial workplace.

Research conducted in 2007 by the Homecoming Revolution on expatriates revealed that the second most prominent reason for leaving South Africa is the fact that there are job opportunities elsewhere in the world (2007, November. Retrieved February, 23, 2008 from <http://www.homecoming-revolution.co.za>).

It is reasonable to assume that individuals will go anywhere to explore and exploit job opportunities in their quest to find personal fulfilment. Kurtz (2000) argued that the ultimate goal of human life is twofold, firstly to survive, and secondly, to flourish by the fulfilment of one's dreams and aspirations. One could view dreams and aspirations as part of career development. Greenhaus, Callanan and Godschalk (2000) stated that:

For most individuals, work is a defining aspect of life. Our happiness and fulfilment can hinge on how well we are able to control the course of our work lives, and manage the effects of our work on our family and personal life (p. 1).

From an organisation's perspective, human resources are their most critical assets, and therefore, they invest millions of Rands every year to stimulate their workforce and create career opportunities.

It will be useful to gain an understanding of what it means to be an expatriate as such an understanding would augur well in favour of cushioning adjustment and facilitating productivity and growth. The purpose of this study is to gain knowledge from the shared experiences of those who have taken the proverbial "first steps" into the novel and unknown. Meyer (2001) found that many South Africans took this step when they were older, and these South Africans established networks abroad although more social than professional networks.

1.2 MOTIVATION FOR THE STUDY

A central assumption that expatriation is a positive career experience underpins this current research. Expatriation is a phenomenon that increases year after year. Most people today are able to name a family member, friend or colleague that has experienced this phenomenon. Whilst the increase in expatriation is becoming more evident, how these experiences impact the lives of individuals, parents, children, friends or colleagues of expatriates is not well known and documented. This study aims to explore expatriation as a career experience as well as the broader social circle of which the expatriate is a part.

The advantages of exploring these experiences will give other people (broader society, organisations, individuals, young children) a better understanding of these experiences, be they positive or negative, and hopefully assist in future decision-making by all concerned. Another benefit of this study is to cultivate an understanding of the expatriates' social network and how relationships influence decision-making and support.

Exploring why people relocate temporarily or permanently, as well as the importance of a career for an individual, will be the first step in attempting to understand the phenomenon called expatriation. One should be able to identify key themes that highlight the importance of attempting to understand why people emigrate and how it is experienced by their friends and family.

Over and above the experiences that will be documented, other external influences are relevant to this phenomenon, such as the 21st century world of work, environmental factors, the role of human resources in expatriate relocation and finally, career development implications. These are all aspects, which contribute to deciding on expatriation and will thus also be addressed in this study.

1.3 GUIDING QUESTIONS

The aim of the research is to gain knowledge about expatriation as a career experience, and how it contributes to career development.

The invitation to impart information relevant to the research will be: "Please share your experiences of your expatriation with me". The researcher assumed that if the persons interviewed are articulate enough, they would themselves indicate the salient issues and that it will not be necessary to administer a preset questionnaire. A preset questionnaire could imply a hypothesis and it could also detract from the spontaneity required in such an explorative study. However, if necessary, the observer could prompt the person to share experiences that would elucidate the following issues:

- a. What were the reasons for relocating to another country?
- b. How did this experience influence expatriation issues?
- c. What impact did relocation have on family life?
- d. What was the reaction of friends and colleagues?
- e. What was the impact on the social network (family, friends, colleagues, church)?
- f. How did this phenomenon impact family time and values?

The qualitative research paradigm is relevant to this exploratory investigation and will be discussed in the following section.

1.4 METHODOLOGICAL APPROACH

There are two main research approaches, a deductive and an inductive approach. Saunders, Lewis and Thornhill (2003) make the distinction between the two approaches: a deductive approach which implies developing hypotheses based on the existing theories, and thereafter research is conducted in an attempt to test the hypotheses; an inductive approach meaning that, firstly, data is collected and secondly, a theory is formulated after analysing the data. Charmaz (2006, p. 188) describes induction as "a type of reasoning that begins with a study of a range of individual cases and extrapolates patterns from them to form a conceptual category". According

to Sidani and Sechrest (1996), the two methodologies (quantitative and qualitative) are likely to differ on several grounds, namely theoretical perspective, the purpose and design of the research and the applicable data collection and data analysis methods. For the purpose of the current study, an inductive approach is followed.

1.4.1 Definition of qualitative research

Babbie and Mouton (2002) describe the qualitative research paradigm broadly as a "generic research approach in social research according to which research takes as its departure point the insider perspective on social action" (p. 270). The authors further state that this perspective is referred to by anthropologists as the emic perspective, or differently stated, it is an attempt to study human actions from the perspective of the individuals' experiences.

Sidani and Sechrest (1996) describe qualitative research as interpretive in nature where results are dependant on the researcher's subjective understanding of the phenomenon under study. They further state: "subjective understanding requires personal contact and conversation with the participants, as well as the ability to set aside previous knowledge. Its success is also determined by the use of intuition, which means an in-depth attention to various aspects of the phenomenon and submersion in the phenomenon" (Sidani & Sechrest, p. 162).

1.4.2 Qualitative paradigm

"There is no burden of proof. There is only the world to experience and understand. Shed the burden of proof to lighten the load for the journey of experience. Qualitative inquiry cultivates the most useful of all human capacities – the capacity to learn from others." (Patton, 1990, p. 7)

1.4.3 Research paradigms

Deshpande (cited in Healy & Perry, 2000, p. 101) states that:

"scientific research paradigms are overall conceptual frameworks within which some researchers work, that is, a paradigm is a world-view or a set of linked assumptions about the world which is shared by a community of scientists investigating the world."

In general, there are three paradigms relating to research, the first is called the interpretivist paradigm, which believes that human phenomena are essentially different from natural phenomena. Phenomenology analyses human and natural phenomena and seeks the differences and dissimilarities within the context of individual consciousness. Schutz (1962) contends that social scientists have to take into account that actors in the social world make sense of their world by utilising first-order concepts and self-understandings. This paradigm will require a different methodology to study the phenomenon, as its main aim is to understand or interpret human behaviour, rather than explain or predict human behaviour. This, according to Babbie and Mouton (2002) is in direct contrast to the second paradigm, called positivism, which believes "that the social sciences should follow the lead of the natural sciences and model its own practices on that of the successful natural sciences" (p. 645). The three characteristics of positivism as a research practice involve seeking universal laws of human behaviour. It is measured in quantity, and objectivity means that there needs to be a distance between the researcher and the subjects. The third paradigm is critical theory and has its roots in the philosophy of Karl Marx, which criticised the capitalist society and insisted on an emancipatory social theory.

Guba and Lincoln (1994) synthesise scientific paradigms into four categories, namely, positivism, realism, critical theory and constructivism. These four categories are discussed below in more detail.

Positivism: This paradigm is predominant in science and works from the premise that science quantitatively measures independent facts about a particular reality. "In other words, the data and its analysis are value-free and data does not change because they are being observed. That is, researchers view the world through a one-way

mirror" (Guba & Lincoln, 1994, p. 110). Thus, positivist researchers disconnect themselves from the world they study.

Realism: It is the belief that there is a "real" world to be discovered and the ontological assumptions underpinning this world consist of non-figurative things that are born of people's minds. According to Babbie and Mouton (2002), the key feature of this approach is the accent drawn to the differences and dis-analogies between human subjects and natural phenomenon.

Critical Theory : Critical theory emphasises social, political, cultural, economic, ethnic and gender values and the researcher's main aim is to critique and transform these social realities. Typical research inquiries involve long-term ethnographic and historical studies of organisational processes and structures, and knowledge is grounded in social and historical routines.

Constructivism: Constructivism investigates the ideologies and values behind a finding and believes in multiple realities as, the truth is a particular belief system held in a particular context. This approach requires the researcher to be an active participant in the research exercise and may be suitable for some social science research.

Each of these categories have three elements, namely ontology, which means the reality that the researcher is interested in; epistemology which refers to the relationship between the researcher and the reality and, finally, methodology which refers to the particular technique applied by the researcher to learn more about that reality. The following section will discuss criteria for judging good qualitative research. Grounded theory will be the particular methodological approach to be applied in this study.

1.5 CRITERIA FOR 'GOOD' QUALITATIVE RESEARCH

A number of authors identified criteria for judging what constitutes good qualitative research in Psychology. Henwood and Pidgeon (1997) suggested

seven attributes that attempt to meet the criteria for good qualitative research. The basic underlying assumption for establishing these criteria is that the researcher (the knower) and the researched (the known) are not independent entities, and objectivity is therefore not viewed as meaningful criteria for judging qualitative research, but is rather concerned with ensuring thoroughness while acknowledging idiosyncrasy and creativity in the research process. The criteria include seven key areas, consisting of: the importance of fit; the integration of the theory; the importance of reflexivity; documentation; theoretical sampling and negative case analysis; sensitivity to negotiated realities; and transferability. A full description of each of the mentioned criteria follows:

- The *importance of fit* places the responsibility on the researcher to ensure that categories generated fit the data well and that the researcher needs to write unambiguous and comprehensive accounts of particular labels attached to phenomena.
- *Integration of theory* refers to various levels within the process and the relationship between units of analysis. The integration process and its rationale should be documented concisely.
- *Reflexivity* focuses on acknowledging the role of the researcher and its influence on the entire research process and this need to be documented.
- *Documentation* is crucial and serves as an audit trail for the entire research process. The researcher has the responsibility to provide a comprehensive account of what was done and why, throughout the research process.
- *Theoretical sampling and negative case analysis* refers to the role of the researcher that should constantly seek to extend and modify emerging theory.
- *Sensitivity to negotiated realities* refers to the researcher's awareness and interpretation. Awareness of participants' reactions and those of the researcher should be explained.
- *Transferability* places the responsibility on the researcher to report on the contextual features of the study.

Elliott, Fischer and Rennie (1999) identified their set of criteria for the evaluation of qualitative research. They propose a number of criteria, which are appropriate to apply

in both qualitative and quantitative research (e.g. appropriateness of methods, clarity of presentation and contribution to knowledge) but also distinguish further criteria for judging good qualitative research. These criteria are:

- *Owning one's perspective* refers to the role of the qualitative researcher. The researchers, for this reason, make public their own values and assumptions to allow readers to interpret the analysis and to consider possible alternatives (this corresponds broadly with the principle of 'reflexivity' of Henwood and Pidgeon , 1997).
- *Situating the sample*, means that the researchers should contextualise their findings and describe participants in the best possible detailed manner in order for anyone else to gauge the relevance and applicability of the findings within a particular context (this corresponds broadly with the principle of 'transferability' of Henwood and Pidgeon).
- *Grounding in example* refers to the use of examples of the data to demonstrate the analytic procedures, as well as the understanding and interpretation of the data in order for others to assess the fit (this corresponds broadly with the 'importance of fit' principle of Henwood and Pidgeon).
- *Providing credibility checks* refers to the responsibility of the qualitative researcher to ensure they have credible accounts by consulting other people (e.g. colleagues, participants, other researchers) or by using other methods of analysis in relation to the same subject matter (corresponding broadly with the principle of 'sensitivity to negotiated realities' of Henwood and Pidgeon).
- *Coherence* is concerned with the qualitative researchers' aim to present analyses that are characterised by synergy and integration (e.g. a framework or underlying structure) while preserving nuances in the data (this corresponds broadly to the principle of 'integration of theory' of Henwood and Pidgeon).
- *Accomplishing general versus specific research tasks* emphasise the importance of clarity on the research tasks. Whether the researchers seek to develop a general understanding of a phenomenon or whether they aim to provide insight into a specific phenomenon, it is still their responsibility to ensure clarity and applicability.

- Resonating with reader refers to the responsibility of the researcher to ensure that the research is meaningful to the reader and that the reader achieves understanding and appreciation.
- The researchers need to be aware of their own values, prejudices and assumptions. It must be indicated that they have taken all reasonable steps to bracket their own expectations in favour of an exploratory stance. Researchers should show an awareness of the possibility that the alternative analyses and interpretations could constitute different realities.

Lincoln and Guba (1985), also refer to key criteria for judging good qualitative research. The key principle, according to these authors, is trustworthiness. For a researcher to account for the work completed and whether it is worth paying attention to, Lincoln and Guba state that for a qualitative study to be transferable, it needs to be credible, and for this study to be deemed credible, it needs to be dependable. Credibility is achieved by applying a course of action, which includes prolonged engagements (data need to be saturated first before the researcher moves on). Credibility is also achieved by persistent observations, as the researcher needs to find multiple influences and pursue interpretations in different ways. Thirdly, credibility is achieved by triangulation, whereby the researcher asks different questions, seeks different sources and applies different methods to elicit the divergent constructions. Peer debriefing is another course of action to achieve credibility, and it is done with a colleague who understands the nature and context of the study. Referential adequacy as another procedure in achieving credibility refers to the available materials to document the researchers' findings. Finally, by doing member checks to assess the intent of the respondents, credibility can also be achieved.

Another principle in achieving trustworthiness as stated by Lincoln and Guba (1985), is called transferability. As stated previously, the authors believe that transferability is one of the criteria that justify trustworthiness. Lincoln and Guba describe transferability as the applicability of the findings of the study to other situations, contexts and with other respondents. The authors suggest two strategies for a study to be deemed transferable. The one strategy is called thick descriptions and the other is called purposive sampling. Thick descriptions

require that the researcher collect a lot of detail about the context to allow the reader to make judgements. Purposive sampling is achieved by collecting the maximum information about the context. In this instance, the researcher purposely selects respondents and locations that differ from one another.

The final principle proposed by Lincoln and Guba (1985) to achieve trustworthiness in a qualitative study, is called dependability, and refers to the responsibility of the researcher to provide evidence about the findings that could be confirmed, with the same respondents and within a similar context. According to Lincoln and Guba, there can be no credibility without dependability.

The researcher will ensure that raw data (recorded interviews, e-mail correspondence, written field notes) and any other documents are made available for audit purposes and to confirm that the findings are not biased, but rather the product of the inquiry. The compilation of field notes, theoretical notes, developed themes, conclusions drawn, expectations and ethical considerations will all be available for audit purposes. By means of this transparent process, the researcher can ensure trustworthiness.

1.6 OPPORTUNITIES AND LIMITATIONS IN QUALITATIVE RESEARCH

According to Elliott et al. (1999, p. 149) there are numerous opportunities and limitations associated with qualitative research as a method. An acknowledgement of opportunities, as well as limitations, encourages a reflexive awareness of the limits of our own and others' claims to knowledge and understanding. The opportunities are that:

- qualitative research provides the researcher with an opportunity to study meanings.
- it allows the researcher to tap into the perspectives and interpretations of participants.
- it facilitates the generation of genuinely novel insights and new understandings.

- qualitative methods of data collection and analysis may be thought of as ways of listening and their strength may be said to lie in their sensitivity to diverse forms of expression.
- such methods are able to tolerate and even theorise tensions and contradictions within the data.
- qualitative research pays attention to exceptional cases and idiosyncrasies in order to gain a more complete understanding of a phenomenon.
- qualitative research tends to be open-ended in the sense that the research process is not pre-determined or fixed in advance. As a result, unjustified assumptions, inappropriate research questions, false starts, and so on can be identified, and the direction of the research can be modified accordingly.
- qualitative studies tend to work with small sample sizes in depth, which means that they can generate insights about the dynamics of particular cases.
- validation comes to depend on the quality of craftsmanship in an investigation, which includes continually checking, questioning and theoretically interpreting the findings. In a craftsmanship approach to validation, the emphasis is moved from inspection at the end of the production line to quality control throughout the stages of knowledge production.

From a qualitative perspective, Goulding (cited in Sidani and Sechrest, 1996, p. 156) highlighted some of the advantages of qualitative research:

- The emphasis is on multiple realities;
- There is a mutual interactivity between researcher and phenomenon;
- There is a belief that causes and effects cannot be separated;
- The notion exists that research is value laden;
- The outcome of the research is socially constructed.

The following section will explain the limitations of qualitative research according to Elliot et al. (1999, p. 149) and these include:

- Qualitative research does not provide the researcher with certainty about the generalisability to other contexts of the information as revealed.
- Qualitative research tends to be concerned with complex social and psychological processes, which involve the negotiation of meanings and interpretations among participants, including the researcher, and the data cannot be easily controlled by statistical means.
- Even those qualitative researchers who work from within a realist paradigm need to address the role of reflexivity (the influence of the researcher) in the research process.
- Alternative interpretations of the data are always possible.
- Qualitative research does not allow the researcher to identify generally applicable laws of cause and effect.
- Qualitative studies tend to work with small sample sizes in depth, which means that they can generate insights about the dynamics of particular cases. They cannot, however, make claims about the trends, regularities or distribution in a population.
- Since qualitative studies explore phenomena within their natural contexts, they are not able to control some variables so as to focus on others. As a result, qualitative research tends to be holistic and explanatory rather than reductionist and predictive.
- Since different qualitative research methods work from different epistemological positions, it is not always possible to compare or integrate their findings even when they are concerned with similar subject matter.
- Understanding and evaluating a study's results, requires a clear comprehension of its epistemological base.
- Qualitative researchers, who are experts in one particular methodology, are not necessarily good judges of other types of qualitative research. This means that the qualitative research community is characterised by a certain amount of fragmentation and division, which does not facilitate collaboration and communication among its members. It could be

argued that the various qualitative research methods should be evaluated purely within their own terms and that a comparison between them should confine itself to highlighting their different views and emphases.

According to Neuman (2003), there are distinguishing factors between qualitative and quantitative researchers. For the purpose of this paper, only the characteristics of qualitative researchers will be discussed, however, it is important to note that there is a place for quantitative research. Neuman emphasises the following factors:

- Qualitative researchers use "soft data" in the form of words, sentences, impressions, photo's and symbols;
- Qualitative researchers use a transcendent perspective, apply logic in practice and follow a non-linear path;
- They use contextual factors and are interested in detailed examinations of participants in the natural flow of social life;
- Qualitative researchers try to be sensitive in interpreting data as well as being authentic.

Sidani and Sechrest (1996), found that social scientists question the validity of the "self-report" data collection method used by researchers. The validity of self-reports is not always upheld, namely the openness and honesty of participants, social desirability of participants, compliance, and clarity of directions, questions, and response options are issues that must be taken into consideration when interpreting results obtained from an unstructured questionnaire. Another point worth mentioning relates to the participants' knowledge that they are being studied and their willingness or desire to please the researcher. Other considerations include that the mechanisms underlying the observed changes in the participants' behaviours might not have been precisely determined. Factors other than those theoretically expected might have been responsible and might have led to a "turning point" in the participants' life. Malterud (2001, p. 483) describes particular terms used in qualitative research. Some of these terms have been discussed previously, and

others were dismissed. The Table 1.1 gives more detail of these respective terms, metaphors, as well as a description.

Table 1.1 TERMS USED IN QUALITATIVE RESEARCH

Term	Metaphor	Description
Reflexivity	The knowers mirror	An attitude of attending systematically to the context of knowledge construction, especially to the effect of the researcher, at every step of the research process.
Preconceptions	The researcher's backpack	Previous personal and professional experiences, pre-study beliefs about how things are and what is to be investigated, motivation and qualifications for exploration of the field, and perspectives and theoretical foundations related to education and interests.
Theoretical frame	The analyst's reading glasses	Theories, models and notions applied for interpretation of this material and for understanding a specific situation.
Metapositions	The participating observer's sidetrack	Strategies for creating adequate distance from a study setting that you are personally involved in.
Transferability	External validity	The range and limitations for application of the study.

Malterud, . K. (2001, p. 483). Qualitative research: Standards, challenges, and guidelines. *The Lancet; ProQuest Medical Library*, 358 (9280), 483.

These terms are mentioned to alert the qualitative researcher to be cautious so as not to extend his/her explanations beyond the contextual limits of the particular study. Having acknowledged the limitations of the qualitative method, the researcher has moved a step closer to responsible, disciplined research. It is nevertheless the stance taken in this particular study that qualitative methods bring the researcher closer to the person(s) being studied. In this sense, it is considered a more humane approach, which acknowledges the authentic being of each individual person as he or she intentionally recalls

and relates his or her unique experiences. It reveals an honest desire to go beyond the manipulation of variables and numerical labelling to where it matters most for each person – the intimate experience of life as lived.

Such awe for that which is uniquely human already predisposes the researcher towards observing her "matter" with ethical responsibility.

1.7 ETHICAL DILEMMAS IN RESEARCH

Clifford Christians (cited in Denzin & Lincoln, 2000, p. 36) developed a framework around ethics and concluded that there are primarily two ethical models - one model is utilitarian, and the other non-utilitarian. The author further states that in most recent years, researchers had viewpoints and certain beliefs around ethics, which could either be absolutist, consequentialist, feminist, relativist, or finally, deceptive. According to Christians (cited in Denzin & Lincoln, p. 36), these ethical beliefs and preferences merge with one another. The absolutist model is broad and argues that any method that adds value to a society's self-understanding is suitable, whilst the model of deception argues that any method, whether deception and untruthful, is justified in the name of truth. The relativist model argues that ethical standards depend on the conscience of the individual, and that the researcher has total freedom in his/her field of study. The feminist model argues that qualities like mutual respect, non-coercion, non-manipulation and the support of democratic values are extremely important to adhere to ethical standards.

Denzin and Lincoln (2000, p. 32) maintain that there are many problems or challenges with regard to ethics in research. They comment on critical issues including informed consent and good and bad stories. The authors ask critical questions about informed consent when conducting research, which are true ethical dilemmas and legitimate questions to be asked:

- Who owns an interview once it has been transcribed?
- Whose story is it, and what does informed consent mean when you pay for the story?
- Who is consenting to what, and who is being protected?

- Informed consent can work against the formation of open, sharing and collaborative relationships.
- How does the researcher move to the other side of the hyphen and become an advocate for the stakeholder?
- What is lost, and what is gained, when this is done?
- How can one write in a way that answers the needs of the urban poor in time, and when to paraphrase?

The Health Professions Council of South Africa (HPCSA) legislates the practices of psychologists. The HPCSA prescribes a code of ethical conduct, as well as the Psychological Society of South Africa (PsySSA). PsySSA and its various interest groups advocate and protect the interests of its clients and psychologists through various actions and events, such as marketing, conferences and training. Furthermore, PsySSA manages a publication, the Ethical Codes for Psychologists. This code requires psychologists to subscribe to values and norms, which embrace respect towards professional actions i.e. testing, therapy, research and behaviour towards colleagues in the field, as well as to clients (Schreuder & Coetzee, 2006).

The following chapter will be dedicated to career psychology and the expatriation phenomenon within this particular context.

CHAPTER 2

CAREER PSYCHOLOGY: EXPLAINING THE EXPATRIATE PHENOMENON

The South African economy has not escaped the influence of globalisation. This in itself has become a driving force in moving people across local and foreign boundaries. It is also appropriate to take note of how companies have adjusted to the trend of moving workers, materials and systems across international boundaries.

The South African economy was in a grip of total isolation prior to 1994. There were few exceptions of persons who were able to make a success of their careers in other countries. Such persons were limited in number, so few, that it actually confirms the "rule" that South Africans do not easily emigrate. International sanctions exacerbated the situation at all levels of the macro- and micro-economy. When the political changes set in after 1994, following the disbanding of the African National Congress (ANC), the release of Mandela and the first democratic election, the doors to the outside world opened rapidly. Affirmative action and black economic empowerment expedited the process of economic growth, which facilitated the movement of previously disadvantaged persons into positions of management at all levels and in virtually every sector of the economy. Not only did the doors open locally, but many opportunities also became available to find employment overseas. In fact, many international businesses and institutions recruited actively in South Africa. Employment categories that were targeted were nursing, medical doctors, teachers, engineers and the security industry. South African industries actively explored world markets as new sources of investment.

Although there was economic growth, there were a few factors that slowly but surely carved away at this era of hope and opportunity. These factors include

but are not limited to safety and security concerns, the introduction of employment equity guidelines and the broad based black economic empowerment initiatives. These factors impacted people's lives in one way or the other.

Baruch (2002) prediction that the expatriate population will expand, will have an impact on career development. This development will impact the managerial workplace. Furthermore, as globalization spreads, career management within multinational corporations will include overseas posts.

It has been reported in research conducted in 2007 by the Homecoming Revolution on expatriates that the second most prominent reason for leaving South Africa is the fact that there are job opportunities elsewhere in the world. (Retrieved February, 23, 2008 from <http://www.homecomingrevolution.co.za>)

It is reasonable to assume that individuals will go anywhere to explore and exploit job opportunities in their quest to find personal fulfilment. According to Kurtz (2000), the ultimate goal of human life is to survive. Moreover, an individual flourishes when fulfilling his/her dreams and aspirations. One could view dreams and aspirations as part of career development. To achieve true success for certain individuals is to find personal fulfilment in their careers.

The next section will explain expatriation in more detail and explore definitions of this phenomenon.

2.1 DEFINITION OF EXPATRIATION

Various definitions of expatriates exist. An expatriate can also be defined as an individual who temporarily or permanently relocates to another country and culture different from that of the individual's upbringing and/or legal residence. The origin of the word comes from the Latin word ex, meaning out of, and patria, meaning country (Retrieved 18 January 2008 from <http://en.wikipedia.org/wiki/expatriate>).

An expatriate can be defined as a "citizen who is a resident in another country" (Retrieved 18 January 2008 from http://www.parliament.vic.gov.au/sarc/E-Democracy/Final_Report/Glossary.htm). Expatriates are sometimes seen as individuals who prefer to live in another country to avoid paying tax (Retrieved 18 January 2008 from <http://www.indiainfoonline.com/bisc/jmft.html>). In another context, expatriate is defined as someone who is expelled from his country for a particular reason, in most instances, political reasons. Another definition suggests that an expatriate is someone moving away from his/her native country and adopting a new residence overseas (Retrieved 18 January 2008 from <http://wordnet.princeton.edu/perl/webwn>).

Noe, Hollenbeck, Gerhardt and Wrights (2003) define an expatriate in the organisational context as an employee who is sent by the organisation in one country to go to a different country to manage operations for the organisation. They further separate expatriates into various categories of international employees. These categories include parent-country nationals (PCNs), host-country nationals (HCNs) and third-country nationals (TCNs). PCNs are described as employees who were born in the parent country (the country in which the corporate headquarters are located) as well as live in the parent country. HCNs are described as employees who were born in the host country (the country to which the parent country located or would like to locate to). TCNs are employees born in neither the parent nor the host country, but these employees work in the host country. Kirkpatrick (1995) defines the term expatriate, amongst other definitions, as an immigrant. The American Heritage Dictionary (Retrieved 5 May 2008 from <http://www.thefreedictionary.com/immigrant>) in turn defines an immigrant as a person who leaves a particular country to live permanently in another country.

The Wikipedia definition referred to earlier in this chapter resonates with the expatriates considered in this study, and will be studied, focusing on the impact of this phenomenon on the efficiency of the worker, and relevance thereof for

human resources management (Retrieved 18 January 2008 from <http://en.wikipedia.org/wiki/expatriate>).

2.2 ADVANTAGES AND DISADVANTAGES OF EMPLOYING EXPATRIATES

Gomez-Mejia, Balkin and Cardy (1995) propose some advantages and disadvantages associated with employing expatriates.

The advantages for an organisation include the transfer of business practices because of the cultural similarity with the parent company. It also permits closer control and coordination of international subsidiaries, as well as an established pool of internationally experienced employees. From the employee's side, an advantage is the opportunity to adopt a multinational orientation through experience gained at the parent company. Black, Gregersen and Mendenhall (1992) suggest that every country does not have the same security and quality standards, and by employing expatriates, organisations are able to respond directly to problems earlier and can also deal more effectively with cultural difficulties. Employees also gain the opportunity to develop a multi-national orientation.

The disadvantages associated with employing expatriates could be the problems of adaptability to a foreign environment and culture; the possibility of high transfer and salary costs for the organisation; potential personal and family problems; possible high failure rate; the demotivating and disincentive effect on local-management morale and possible restrictions to local government policies.

2.3 WORK LIFE BALANCE VERSUS THE PROTEAN FAMILY

The pursuit for meaningful and challenging work has been accompanied by an intense concern for a satisfying personal life. According to Greenhaus (1989), the pursuit of career success has latent cost, meaning that one would possibly spend less time and/or energy with family, recreation and self-development.

Many employees prefer a balanced life and believe that the trade offs associated with the search of career success are extreme. These employees go as far as refusing promotions or relocations and are unwilling to work 14-hour days and a 7-day week. A balanced life-style is on the list of many employees, as they always strive towards it, but the reality is different for many of these employees and it can produce ambivalent feelings in many employees. The conflict exists because money, advancement, challenge, responsibility, and interesting work are sought and valued on the one hand, but at the same time leisure, family, and self-development are also sought and are as important at times. Greenhaus et al. (2000) found that many employees are seeking a bounded involvement with work so that work does not constantly intrude into other parts of their lives. The protean family experiences less of this conflict as it is prepared to put the needs of the family members above anything else.

The intertwining of family and work roles is inevitable. As individuals are more confronted by and experience an increase in conflicting roles, satisfaction in both work and family domains could decrease. Typical antecedents leading to such conflict include multiple care-giving roles, lack of control over the work domain of the individual, no support from the social network, gender and demands of the job (Hoffman & Tetrck, 2003).

Greenhaus et al. (2000) reported results of a survey conducted by Robert Half International, where the following was discovered:

Ninety two percent (92%) of the executives polled believed that, in comparison to five years ago, more employees are now concerned with a balance between work and family life. Over the same five-year period, there has been a decline in the willingness by executives to work longer hours, which accounts for 49%. Ones and Viswesvaran (1999) in their study on how female expatriates adjust internationally, argue that if expatriates are unable to adjust to work and life, the likelihood that these expatriates will perform poorly is high. The following section will explore the challenges of dual-career couples in the context of expatriation.

2.4 DUAL-CAREER COUPLES

Along with the opportunities created by women entering the workplace, there are also a number of challenges. One of the challenges it brings about is the situation where both men and women are committed to their careers on the one hand and to their family life on the other hand (Schreuder & Coetze, 2006). This is of particular relevance to expatriates as the decision to relocate becomes more difficult as consideration of the career of the spouse places added pressure on the decision-making process within a family context. Greenhaus et al. (2000) refer to a Fortune Study conducted with working parents. It was concluded that children suffer in these situations as they are neglected by not being given enough attention as a consequence of working parents not spending enough time with their children. However, not everything is negative for these children. There are advantages associated with children of dual-career couples, which include the fact that these children are more resourceful and independent. These children also hold more democratic sex-role attitudes. The research findings suggest that the quality of the parent-child relationship, the quality of childcare and the personal satisfaction of parents are the most critical factors impacting on any child's adjustment, rather than the fact that they are dual-career couples.

Punnett, Crocker and Stevens (1992) contend that it is critical for companies to take a proactive approach to dual-career couples if they are to attract and retain the best. They extend the definition of this approach to the ability of the company to incorporate, as part of their human resources policies, family-related policies that will take care of this challenge. In doing so, they will be able to increasingly attract the best talent in future workers. The evidence further suggests that both dual-career couples and female managers are increasing, and that a future trend seems likely that more women will accept expatriate assignments. It is therefore imperative that global firms address the issue of dual-career couples in international transfers, as well as the specific case of the husband as spouse in these transfers. Expatriates believed it to be important that organisations realise that most spouses have careers, and are

not interested in just any job, but rather something that contributes to a sense of self-worth and future career opportunities. The key issue derived from their perspective was the ability to undertake activities that could benefit their careers and provide interesting activities while in the foreign location. Tung (2004) found that one of the top five impediments to female career advancement is the fact that females cannot accept international assignments as a consequence of various family challenges. Some global companies have begun to recognise this issue of dual-career families and the potential problem confronting them in the next decade.

The challenge to managing dual-career couples, especially female expatriates, is possibly much broader than anticipated, as, in the current social system, male partners generally have careers. The potential adjustment problem for many men to the role of secondary breadwinner or homemaker in another country could prove to be extremely challenging, as these are traditionally woman roles. According to Punnett et al. (1992), society judge's men by their career advancement more than it does women thereby placing a lot of pressure on men. The majority of expatriate managers are still male and the non-working expatriate spouse group is still mainly women, which further complicates the matter. In addition to these concerns, some of the political, economic and social challenges facing dual-career couples include the work permit restrictions of some host societies. These restrictions make it difficult, if not impossible, for a spouse to work as some countries seldom grant work permits to both spouses. Another challenge is that in other countries, even if there are no work permit restrictions, there may be bias against men working in predominantly female occupations or vice versa. Keeping two careers on track while abroad is another challenge because career advancement may be limited in a foreign environment and professional requirements and designations can also vary from country to country. One spouse may have to make career sacrifices and this career will then trail behind the other spouse with the lead career. Copeland and Griggs (1988) estimated that American companies lose \$2 billion a year in direct costs due to expatriate failure and that part of the loss could be attributed to the dual-career couple issue. These complications can result in firms not exploiting the full potential of their talent pool. Rather it seems that companies could offer active assistance to couples

for resolving the dual-career/expatriate dilemma. One possible means of improving this performance may be greater attention to the dual-career issue. The importance and impact of dual-career couples have been explored, and the following section will focus on family- and organisational support in the expatriation phenomenon.

2.5 FAMILY AND ORGANISATIONAL SUPPORT

Research suggests that assessment and selection of expatriates should take an approach that more closely reflects the reality of expatriate needs and specifically takes greater account of situational factors such as the expatriate's family. The family members of the expatriate and how well they adapt is critical to the work performance of the expatriate. Research identified certain factors that negatively influence family adaptation, including unrealistic expectations of the environment, culture and lifestyle, cultural insensitivity, being away from the normal support network, poor work-family balance, absent career opportunities for trailing spouses and limited facilities for expatriate children's education and leisure. This will certainly vary from one country to another. For the reasons stated above, organisations should invest more in assisting expatriates and their families to adapt as quickly and possible (Retrieved 9 July 2007, <http://www.psiliimited.com>).

Vogel (2006) found that the recent demographic profile of South African expatriates vary between 23 and 60 years of age, unlike the international staffing trend where multinational enterprises (MNEs) are sending younger employees on international assignments. The reasons are that younger employees do not, in most cases, have trailing spouses and children who will add to the cost of an international assignment and, as was seen in a number of studies in the USA, is a major contributor to the early termination of an international assignment (Vogel, p. 171). In this research, the majority of South African expatriates are married, highlighting the fact that organisations will have to support the families of these expatriates. He further states that in a

study conducted in 46 countries it was found that the amount of organisational support that an expatriate feels he or she is receiving and the relationship between this person's work and family domain, have a direct and unique impact on the individual's intentions regarding staying with or leaving the organisation.

Organisations, which have recognised the importance of family support, interview both the spouse and the manager before deciding whether to approve the assignment. Vogel (2006) suggests that organisations will have to give extensive training to expatriates that should include cultural sensitivity and language training. He further notes that training should be aligned to the duration of the assignment as the literature suggest that age can influence the success of an international assignment. Vogel (2006, p. 179) also found that there was a statistically significant relationship between the age of expatriates and the preparation, support and training required (dependent variables) by them. Analysis of the survey questions revealed the following interesting insights:

- The organisation should pay for the storage and insurance of those household goods and other belongings remaining in the home country. While 85.7% of the expatriates, thirty-five years and younger, agreed with the statement, 100% of the expatriates older than thirty-five agreed with the statement.
- The organisation should provide the expatriate with legal assistance in order to make or update a will prior to departure. While 82.14% of expatriates thirty-five and younger agreed with the statement, only 56.76% of expatriates over thirty-five agreed with the statement.
- The organisation should assist expatriates' spouses to find work in the host country. While 90% of expatriates thirty-five and younger agreed with this statement, only 43.75% of expatriates over thirty-five agreed with this statement.
- The organisation should provide the expatriate with reading material such as newspapers from the host country to prepare the expatriate for the new location. While 82.14% of expatriates thirty-five years and younger agreed

with this statement, only 59.46% of the expatriates over thirty-five agreed with this statement.

- Expatriates should receive cross-cultural training focusing on subjective characteristics of the host culture such as: customs, values and beliefs. While 96.43% of expatriates thirty-five and younger wished to receive subjective cross-cultural training, only 78.38% of expatriates over thirty-five wished to receive this training.

Punnett et al. (1992) found that if organisations ignore the needs of the family, the costs to the transferee and his/her spouse and the firm could be proportionately much higher in monetary and human terms.

2.6 MOBILITY OF EXPATRIATE

The contemporary expatriate management literature suggests that expansion of the global economy has led to increasing levels of expatriation (Brewster, Carey, Dowling, Grobler, Holland & Warnich, 1996). This indicates that on an individual level, a growing number of employees will experience expatriation at some point in their working lives, and this trend is possibly here to stay. With forecasts of increasing international mobility over the next decade and well into the third millennium, expatriation will be an increasingly common work experience.

Problems in all its forms need to be solved by people. Kozloff (1996) argue that having the right people in the right place at the right time emerges as one of the keys to a company's success, be it local or international. The cost involved with employing expatriates is reported to be easily two to three times higher than the annual income of a person in the home country'. Yet there are benefits for both parties, the organisation and the employee, in having someone work abroad. Some of the benefits for the organisation are that they develop skills, expand networks and use the expertise of the expatriate to gain a competitive edge. For the individual, the benefit is international travel and career experiences. However, the

problems experienced by some individuals and dual-career couples may limit their mobility.

The following section will focus on career experiences in the broader context of expatriation.

2.7 THE 21st CENTURY WORKPLACE

The 21st Century brought about changes in the world of work, which shaped careers in a way one probably never imagined! Such changes included companies needing to downsize, merge, import, acquire and outsource. The changes either created increased work opportunities, or took away some of these opportunities. The presence of globalisation changes the face of business in the sense that it created some uncertainty, and this had a subsequent effect on careers. On the positive side, one could argue that the availability of overseas assignments is bringing about more opportunities in the career field for employees, but obviously not without its challenges (Greenhaus et al., 2000).

In South Africa, career psychology is a contentious issue in the sense that due to the political environment and socio-economic factors, the majority of South Africans were restricted from access to various careers (Stead & Watson, 2006). According to Crites (1969), three essential conditions for vocational choice need to occur, which include the fact that an individual needs to have alternatives to choose from, the motivation to choose, and the freedom to make the choice. It is obvious that, in the life experience of the black South African, none of these three conditions existed. Cognisance should be taken of the fact that career development theories have been violated. It is essential to take this context into account in this study.

From an organisational perspective, the war for talent has been top on the agenda list for the leadership of professional service companies largely due to globalisation (Stumpf & Tymon Jr., 2001). In the modern era, organisations are challenged with employee retention and have realised that careers alone are not sufficient to retain employees, since a plateau can often jeopardise an employee's future career development. The concept of a career ladder, either the traditional managerial or the

professional ladder, was developed by organisations (Nel, Gerber, Van Dyk, Haasbroek, Schultz, Sono and Werner , 2001). This implies that an employee who has not had the opportunity to move up on a managerial ladder may move up on a technical or professional job ladder. This is useful in the context of expatriation as many of these employees are 'technical' experts and organisations offer these overseas assignments based on technical expertise, with the hope of retaining these employees.

2.7.1 Globalisation

D'Andrea (2006) defines globalisation as an umbrella term that refers to the escalation of social, economic, political, technological and cultural processes. These processes are interrelated in a complex manner, which are unique in nature, speed and scale. The contemporary expatriate management literature is very clear about the expatriation phenomenon increasing constantly due to the expansion of the global economy (Brewster, Carey, Dowling, Grobler, Holland & Warnich, 1996). This increase implies that a growing number of individuals will experience expatriation at some point in their working lives. This is not considered a passing trend, with forecasts of increasing international mobility over the next decade and well into the third millennium where expatriation will be an increasingly common work experience, according to the author.

2.7.2 Characteristics of the 21st Century workplace

The growing globalisation of the world's markets is drawing more players into the international business arena (Harzing, 1995). As this growth continues, so does the challenge for large multinational corporations, as they encounter problems associated with sending their employees, "so-called expatriates", abroad. Greenhaus et al. (2000) found that the traditional tenure at organisations is no longer seen as an advantage, in that employer and employee now have a short-term employment relationship. Computer technology has both a positive and negative impact on careers where it creates new job opportunities on the one hand, and on the other results in certain jobs becoming obsolete. Organisations are adopting flatter structures by using cross-functional autonomous work teams instead of the traditional hierarchical structures. The nature of work, in essence, will change as

organisations will employ fewer managers and the managers themselves will have to find innovative ways of supervising employees beyond boundaries and across time. There will be a more culturally diverse workforce, as well as an older workforce comprising of more females and disadvantaged individuals. The work and family life balance will be as challenging as more females become employed. The specific characteristics of organisations of the 21st Century are noted as follows by Greenhaus et al. (2000):

- Permanent workforce, as a percentage of the total workforce, will be much smaller, with a reliance on part-time, contract and contingent workers;
- There will be no hierarchy but rather self-managed teams taking full ownership of vital functions in the organisation;
- Internal and external networks will be broadened;
- Advanced technology will be utilised in work processes.

Selmer and Leung (2003) found that the traditional relational contract is premised on the provision of job security and career development in exchange for employee work effort and commitment. This traditional approach to the employment contract has been altered and there are now more short-term contracts and fewer career development activities. These career development activities may include internal job advertisements, career path information, annual performance reviews, developmental programs, career counselling and assessment, coaching and mentoring, assessment centres and career planning workshops.

D'Andrea (2006) states that globalisation brought about a social rebirth that involves structuring the social life of people claiming to embrace the world as a new home. D'Andrea (p. 98) refers to this notion as neonomadism or to these individuals as global nomads and then further states that:

Although conditioned by political economies, global nomads embody a specific type of agency informed by cultural motivations that defy economic rationale. Many of them have abandoned urban hubs where they enjoyed a favourable material status (income, stability, prestige), and migrated to semi-peripheral locations with a pleasant climate, in order to dedicate themselves to

the shaping of an alternative lifestyle. Certainly, they retain the cultural capital that would allow them to revert to previous life scheme if necessary. Likewise, they define new economic goals when entering alternative niches of art, wellness, therapy and entertainment, catering to tourists and wealthy residents as well as to other neo-nomads. Nonetheless, they have also accepted the instabilities and hardships that characterise alternative careers, insofar as they feel they can actualise cherished values of autonomy, self-expression and experimentation. Ironically, these subjects seem to have reached the apex of Maslow's hierarchy of human needs by turning it upside down. Mobile subjects are internally differentiated in terms of motivations and life strategies.

2.8 CAREERS AS A CENTRAL PART OF HUMAN DEVELOPMENT

As times change, so do human beings. Every human being has the inherent urge to keep on developing and experience self-actualisation. It involves a self-enriching inclination through psychological growth. It is also described as an experience by seeing meaning in being. Greenhaus et al., (2000) view development as an integral part of life, starting from infancy to old age, and because work has a profound effect on human development, it is seen as the most dominant single influence in a person's life. Thus one can conclude that work is central to human development.

According to Schreuder and Coetzee (2006, p. 13), "through work, people identify themselves to themselves and to others". Career development, therefore, plays an integral part in how a person views himself or herself. A person's self-worth and self-concept is largely determined by how the person relates to the environment. It is therefore essential to take an in-depth look into career development and why it plays such an important role in the lives of many people.

Selmer and Leung (2003) found that the emerging category of managers with international career experience is unique in the sense that these individuals have more opportunities available in their careers due to their expatriate experiences. This group of individuals has the ability to think globally and act locally. They further state that these individuals are in a better position to advance to leadership roles in global firms, as part of the prerequisites for these posts are the need for global experience.

Greenhaus et al. (2000) identifies two approaches to how a career is viewed. The one approach views a career as a structural property of an occupation or an organisation, meaning that one could identify some hierarchy of how a person climbs the career ladder. In contrast, the other approach sees a career as the individual ownership or the property of an individual. The authors further state that if an individual engages in any type of work-related activities, one can view it as a career. "A career is defined as the pattern of work-related experiences that span the course of a person's life" (Greenhaus et al., 2000, p. 9). According to Kroll, Dinklage, Lee, Morley and Wilson (1970) career development can be defined as a lifelong pattern of an individual's work-related behaviour. This 'eternal' pattern includes any work-relevant experience and activity before and after entry into a formal occupation.

2.9 MEANING OF WORK

Expatriation often demands a new conceptualisation of work, a re-definition of what renders meaning to one's work – a re-think of who one is and what one does. Howard (2002) stated that we all yearn for a more meaningful life, and that human beings are made up of body, mind, emotions and spirit. These elements to the human being are all interwoven. Csikszentmihalyi (1990) found that a life that pursues engagement, involvement, absorption in work, intimate relations and leisure, is a "happy" life and a meaningful life. "Flow" is Csikszentmihalyi's term for the psychological state that accompanies highly engaging activities where time passes quickly and the focus is entirely on the activity. Maslow (cited in Csikszentmihalyi, 1990, p. 273) found that, "man's

inherent design or inner nature seems to be not only in his anatomy and psychology, but also his most basic need, yearnings and psychological capacity. This inner nature is usually not obvious and easily seen, but is rather hidden". Howard (2002) believes that for all of us, there is a quest for meaning and purpose in order to develop our potential and live a full life.

According to Greenhaus, Callanan and Godshalk (1999), people are in pursuit of meaningful and challenging work on the one hand, coupled with a strong concern for a fulfilling personal life on the other hand. There are potential costs involved in the pursuit of "career success", including sacrifices with family time spent, recreation and self-development. The balancing act is taboo for certain people, and others believe that the trade-offs associated with the pursuit of career success are excessive. Greenhaus et al. (2000) refer to the notion of a protean career as "greater control over one's work life in which career success is judged by internal standards (satisfaction, achievement, a balanced life)" (p. 309). They argue that these internal standards are more important than salary and hierarchy, which are the external factors.

Kroll et al. (1970, p. 143) states that meaning of work is influenced or determined by certain assumptions, which include:

- Man lives in a contingent (possibility/unpredictability) universe and that choice is possible although limited;
- Man's uniqueness as a living form is his capability to discover, create, express and act on meanings;
- Man's growth and development is a social process; and
- The process of decision-making is central to man's functioning as a searcher for meaning.

Beyond just survival, the quality of man's life is a function of the decisions he makes. In a very real sense, a man is his decisions. The process of choice enters into all human activities from the most trivial to the most momentous.

Schreuder and Coetzee (2006) define various stages of the meaning of work and how it evolved from the pre-industrial era to the 21st Century. The authors

state that each of these particular eras has particular meaning attached to it. Work is seen in the pre-industrial era as drudgery, significant to spiritual or religious ends and intrinsically meaningful for its own sake. The second evolution of work was in the industrial era where work was seen as mechanistic and involving mass production. The search for meaning was derived from activities outside the workplace. The information era brought about many new viewpoints of finding meaning in work, such as mastering computer skills and virtual teams. The final era (21st Century) is characterised by boundaryless careers and service-driven individuals and organisations. The search for a higher purpose and work is central to the search process. The search for this meaning/purpose/spiritual wholeness happens within the work context, as work forms part of our lives and takes up most of our time. "In the modern workplace many people are increasingly embarking upon a spiritual journey, seeking to discover their true selves through the search for a higher purpose that provides meaning to their lives" (Schreuder & Coetzee, 2006, p. 14). The authors further argue that there are a number of variables that determine the meaning of work, including a sense of belonging in society, values, power structures, status, central life interest, leisure, self-actualisation, competency and spirituality at work. Table 2.1 explains all these variables in more detail.

Table 2.1 VARIABLES DETERMINING THE MEANING OF WORK

A sense of belonging in society	The feeling of being useful in society through one's work by supplying ideas, services or products that are useful to society
Values	The norms, beliefs, principals, preferences, needs, interests, intentions, codes, criteria, world-view or ideology of individuals and societies which determine modes of work and behaviour and work forms
Power structures	Dominant groups in society and organisations that transmit values and goals to the workplace by the virtue of their positions of power and control over economic activity
Status	Social and material achievement that determine an individual's place in the status of hierarchy of the community
Central life interest	Work as viewed as of central importance in an individual's life
Leisure	Activities that fall outside the context of work and that are not necessarily instrumental in sustaining income
Self-actualisation	An inner-directedness through which individuals give expression to their intrinsic nature by self-enrichment,

	psychological growth, and seeing meaning in being
Competency	Individual's skills, knowledge and attitudinal values which enhance their employability and ability to adapt to change and which contribute to satisfying job and organisational requirements
Spirituality at work	The search for spiritual wholeness within the context of the workplace, involving the search to discover one's true self, higher life purpose and meaning through one's work activities and life roles – implying the creation of a work environment of trust, respect, and ethics where diverse groups of individual's can do their best work

Schreuder, A.M.G. and Coetze, M. (2006, p. 5). *Careers: An organisational perspective*, 3rd ed. Cape Town, Juta.

Arthur (1994) found that the changes in the world of work brought about the notion of a boundaryless career (i.e. a career which spans across boundaries). According to Greenhaus et al. (2000), the Protean career, named after the Greek god Proteus, is a career, which could change shape at will. These theories tie in well with the current realities of the world of work in the sense that individuals can pursue their personal views of what is important in work and life. It also supports the challenges around expatriates and career choices they have to make as the emphasis is on the individual's search for autonomy in a particular organisation and a re-drafting of career paths. This re-drafting of career paths requires new personal adjustments where different characteristics and skills are called upon to fit into the protean career, to be elaborated on in the following section.

2.10 PROTEAN CAREER

Hall (2004) defined the "protean career" in the mid-seventies. This definition mentions a few characteristics very different to the traditional career defined in the literature. The protean career's characteristics include the fact that this type of career is driven by the individual rather than the organisation; it is the type of career that calls for frequent changes and self-invention; and it is propelled rather by psychological success than by organisational performance measures. The transformation of the world of work has impacted careers and,

therefore, peoples' lives directly. The continuous restructuring, downsizing, mergers and outsourcing directly impact upon jobs. The structural changes in work arrangements (i.e. from permanent jobs to more part-time arrangements) influenced the employment relationship negatively in the sense that loyalty, trust, morale and commitment decreased. The long-term employment relationship is something of the past, as employees need to go where their skills are needed, and organisations face severe pressure from their competitors and need to sometimes operate 'the mean and lean' principle. According to Arthur and Rousseau (1996), the previously known psychological contract has now been replaced with the social contract that has resulted in the so-called boundaryless career. The so-called boundaryless career is not tied to a particular organisation, nor represented by an orderly sequence; it has less vertical co-ordination and stability.

Stead and Watson (2006) highlighted the dilemma of traditional career development theories, including Holland's theory, Super's development theory, Lent, Brown and Hackett's social cognitive theory, in that these theories depart from the reductionist paradigm. In essence, it means that phenomena can be broken into single parts and that these parts will lead to the total sum of knowledge about the phenomena. According to Stead & Watson, 2006, other organisational models of career development are built on the premise that organisations have various structures and individuals need to adapt and move through these structures and perform functions in static trait-orientated terms. Becker and Strauss, (1956) developed an organisational model of career development which is known as the adult socialisation model. Furthermore, the authors postulate that a career is used by an individual to move through structures within the organisation, and their model primarily focus on the concept of career flow, viewing the flow of individuals through organisations as a number of streams that constitute routes to greater responsibility and higher status.

Schein's organisational model (cited in Arthur, Hall & Lawrence, 1989, p.96) is built on the premise that organisations have various structures and individuals need to adapt and move through these structures and perform functions in

static trait-orientated terms. The movement of individuals within organisations are based on three dimensions, i.e. vertical, radial and circumferential. Vertical movement refers to the increase or decrease of an individual's level within the hierarchy. Radial movement indicates the closer movement to the central (inner circle) within the organisation, and implying special privileges and knowing "secrets" within the organisation. Moving from one function or one division to another is known as circumferential movement. Greenhaus et al. (2000) viewed career development as a structural property of an occupation or an organisation, with hierarchical parameters. These theories therefore create a dilemma in that the contemporary world of work is viewed as a volatile system of constant change with many complexities, uncertainties and chaos, in contrast to the traditional person-environment fit models of career choice. Stead and Watson (2006) further state that a requirement for adopting a chaos theoretical approach is to accept that career development can move on a curve. This development curve can be high or low, depending on periods of in/stability complexities. This development curve can also be affected by unplanned events and change occurs at different rates and degrees, but most importantly, individuals are inventive in re-aligning their career. In the context of expatriation, the chaos theoretical approach is very relevant as the world of work is extremely dynamic and unpredictable.

Expatriation in the context of career psychology has been discussed. The following section will focus on the particular career stages and reporting literature findings.

2.11 STAGES OF A CAREER

Career stages are important to be recognised as many individuals are influenced by a particular stage when they make a career decision. With the exploration of the expatriate phenomenon, the interviewee's age could assist in identifying the particular stage he/she experiences in his/her career. According to Vogel (2006), South African (SA) expatriates are in various age groups, with no particular prominent group. The youngest SA expatriate's age was 23 and the oldest one was 60 years of age. The most recent trends in

international staffing suggest that organisations send younger employees on international assignments for these youngsters do not have a family to take into consideration. According to Vogel (2006), many companies are striving for a combination of youth and experience. By adopting this approach, each age group can learn from the other.

Greenhaus et al. (2000, p. 119) explain that Stage One involves the choice of occupation and preparation for the working world and the typical age of an individual in this stage is below 25 years. Major tasks involve the development of an occupational self-image, the assessment of alternative occupations, the development of an initial occupational choice and pursuing necessary and relevant education.

The second stage involves organisational entry, with a typical age ranging between 18 and 25. In this stage, some of the major tasks involve obtaining job offers from various organisations and selecting an appropriate job based on assessment and accurate information (Greenhaus et al., 2000).

According to Greenhaus et al., (2000), the third career stage refers to ages ranging between 25 and 40. In this stage, some of the major tasks involve: learning the job; learning the organisational rules and norms; adjusting to and trying to fit into one's chosen occupation and organisation; developing and enhancing competence; and pursuing their dream.

Stage Four is termed the mid-career with the typical age between 40 and 55. Major tasks in this stage involve the reappraisal of their career and early adulthood, the reaffirmation of their dream career or the modification of their dream; making choices appropriate to middle adult years; and remaining productive in the workplace.

The late career stage is the final one with age ranging from 55 to retirement. This emphasis in this stage is on remaining productive in the workplace, maintaining their self-esteem and preparing for effective retirement.

Vogel (2006) suggests that as the SA expatriate population is diverse in age (ranging from 23 and 60 years of age), it would be beneficial for SA companies because the younger group of expatriates can learn from the older group, and vice versa. This is beneficial from an organisational perspective however, it would be interesting to explore how, from an individual perspective, age impacts decisions with regard to career changes. The age or career stage at which an individual emigrates will pose different adjustment problems and challenges.

2.12 CHALLENGES OF A CAREER

Schreuder and Coetze (2006) state that to balance work and family life is one of the major challenges of pursuing a career. This will depend on at which career stage individuals need to commit to various life roles. These life roles could include the responsibility of establishing one's identity, wanting to achieve independence and responsibility, making a contribution to society and establishing a career and a family. There are a number of challenges which individuals experience in general, but these challenges are also relevant to the expatriation phenomenon. These challenges include: stress and the ability to manage it; a diverse workforce and the ability to adapt to it; intertwining of work and personal lives; and the never-ending career opportunities offered by a global economy (Greenhaus et al., 2000). Among these challenges are the needs and uniqueness of the individual, as well the responsibility of (managing??) a career. Every human being has the right to be developed to his/her full potential and the role an organisation and the individual can play is enormous. The importance of career development, especially in South Africa, has a long way to go and remains an enormous challenge!

CHAPTER 3

HUMAN RESOURCES MANAGEMENT IN AN INTERNATIONAL ENVIRONMENT

People and organisations operate within an environmental context, which has a major influence on how people behave and how organisations make decisions. The following section will elaborate on critical environmental factors to be considered, particularly within the international human resources arena, as this study is grounded in a global phenomenon.

3.1 THE ENVIRONMENT

Ginter and Duncan (1990) argue that it is critical to scan the environment in order to achieve organisational success. Leaders need to be sensitive to environmental changes as it is likely to affect the organisation. According to Narchal, Kittappa and Bhattacharya (1987), the sectors applicable to the general environment include markets, demographics, economics, political, socio-cultural, and technological. Jones (2000) argues that environmental changes cannot be predicted at all times, hence the challenge organisations face regarding uncertainty, complexity, dynamism and the availability of resources.

According to Shreuder and Coetze (2006) the environmental factors impacting careers are cultural, political, social and economic factors. These are also factors that influence career decisions. Examples of these factors include job opportunities, the education system, family and community influences, remuneration in its various forms, labour legislation that guides employment practices, technological developments, and finally, natural resources and disasters. All these factors could either directly or indirectly influence the career decisions which individuals make and some of these decisions could be beyond their control. The reason why these factors are relevant to this particular study is because expatriation as a phenomenon is exposed to these factors.

3.2 MODEL OF HUMAN BEHAVIOUR

Greenberger and Padesky (1995) developed a model of human behaviour (see Fig. 3.1), which recognises the broader external environment and the human being interacting within this environment. This model explores the physiological, cognitive, moods and behavioural components and their impact on one another. For the context of this study, it is vital to take this

model into account as individuals and their unique experiences are explored. The physiological (i.e. gender) components of an expatriate will influence his/her experience in various ways. One has already seen in the literature that the career opportunities were more open to males than females, often resulting in some challenges to the spouse (wife) of an expatriate. These include loneliness, boredom and, at times, worthlessness as some spouses need to quit their jobs and accompany the husband on this experience. From the husband's perspective, there are challenges and pressures in this job, which the spouse (wife) in this instance, may not be aware of. Some of these physiological components could include the particular needs of the expatriate at that moment. The needs of expatriates influence various decisions they will take regarding their career, family and other aspects.

Human behaviour is also influenced by cognitions, for instance, what one thinks directly influences how one feels (i.e. moods). Moods influence motivation, i.e. if one has a low/negative mood the tendency is great that one's motivation will also be low. According to Selmer and Leung (2003), psychological adjustment deals with subjective well-being or mood states (e.g. depression, anxiety, tension, fatigue). The expatriate could experience any emotion. Black and Gregersen (1991) argue that international adjustment is no longer a unitary phenomenon, but rather a multidimensional concept. The dimensions of this concept include adjustment to the general non-work environment, to interacting with host nationals outside work and to the work. The concept of subjective well-being coincides with psychological adjustment. Selmer and Leung (2003) found that expatriates might feel compelled to acquire new patterns of behaviour to fit in. All these factors are interrelated and ultimately influence the behaviour of the person. Bringing all this closer to this investigation in the expatriation phenomenon, one could argue that if a person has a need to experience something new or different, that person could think of the possibility of an overseas career opportunity. This idea could create extreme exhilaration, leaving the person highly motivated to explore this phenomenon called expatriation. Figure 3.1 explains the interrelatedness of these components.



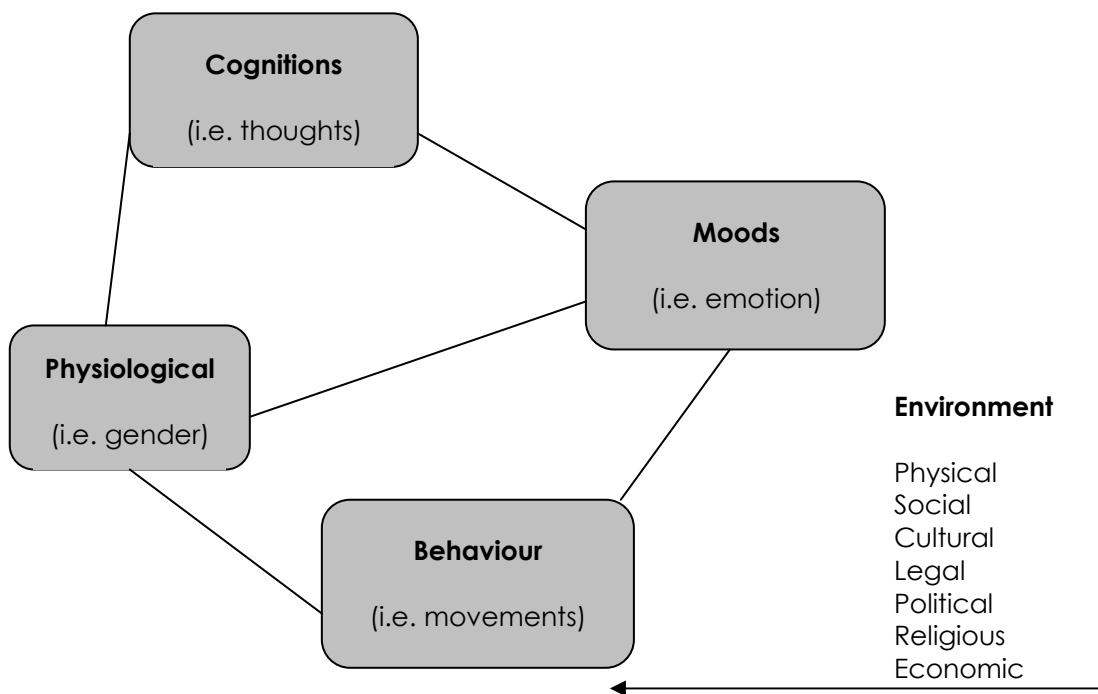


Figure 3.1. ADAPTED MODEL OF HUMAN BEHAVIOUR

Based on a model by Greenberger, D., & Padesky, C. (1995). *Mind over mood: A cognitive therapy treatment for clients*. New York: Guilford.

3.3 POLITICAL, SOCIAL AND ECONOMIC ENVIRONMENT

Expatriates are facing major challenges with regard to adjustment to their political, social and economic environment. News24 online (retrieved 29 August 2008 , http://www.news24.com/News24/South_Africa/Xenophobia/0,,2-7-2382_2383640,00.html) suggested that the South African government needs to take the blame for the recent xenophobic attacks. Research conducted in Sweden by Gustafson (2002) revealed that there are certain limitations to the integration and participation of expatriates as there are signs of increasing xenophobia and ethnic segregation in this society. From a socio-political and economic viewpoint, governments are faced with an additional challenge in migration policies, the rights and obligations associated with

national citizenship. Gustafson posit that there are some political and legal implications for expatriates as well as the government agencies operating in these countries. In his research, the author found that Swedes often argued that the status of citizenship would solve various practical problems. These practical problems are related to travel, work, social benefits and property rights. All these practical problems could easily be resolved, based on the expatriate's citizenship status.

Research released in 2005 (Retrieved 21 December 2007: <http://www.homecomingrevolution.co.za>) on South Africans living abroad, revealed various economic, political and social factors influencing decisions of these South Africans. The research reported that 60% of the respondents surveyed, believed South Africa will be better off in 10 years time. Of the respondents, 40% believed that the country has "a fantastic future" in store. Sixty-two percent (62%) of the respondents were more positive about South Africa than they were five years ago. Crime was the greatest deterrent for the 44% respondents who reported they would not return to SA. Lack of job opportunities was the reason given by fifteen percent 15% of the respondents not intending to return. Other reasons for living abroad were the poorer quality of life (20%) and affirmative action and black economic empowerment (19%).

According to findings on research conducted by the Development Bank of South Africa on expatriates, the most economically productive age group are working abroad. The study reported that 80% of the respondents were within the age group, 25 to 49. In addition, 72% of the respondents possess a post-matric qualification, indicating that South Africa is losing its main "brain power" (Retrieved 23 February 2008: <http://www.homecomingrevolution.co.za>).

3.4 CULTURAL ENVIRONMENT

In the context of expatriation and the role of human resources management, companies need to spend a lot of money to prepare

employees by giving them cross-cultural training. Noe, Hollenbeck, Gerhart and Wright (2003) mention a few success factors for overseas assignments of which one is sensitivity to cultural differences and the flexibility to adapt to cultural norms. The ability to adapt to a new cultural environment has been found to be one of the key success factors of expatriates. Schreuder and Coetze (2006) emphasise that cultural induction, as part of human resources support and preparation, play a critical role in the successful management of expatriates.

According to Brewster, Carey, Dowling, Grobler, Holland and Warnich (1996), five factors appear to be critical to the successful adjustment of expatriates. These are the job environment, the ability to deal with people from different cultures, the motivation of the expatriate, the family support and circumstances and the ability to communicate. Tung (2004) found that female expatriates had an enhanced ability to cope with loneliness while living and working abroad and they were significantly better able to cope with such isolation. Furthermore, Tung believes that women cope better than men due to the fact that women have had more experience in being excluded from existing networks because they are still the sex that has been underrepresented in these types of career opportunities and international assignments. Hence they have become more adept at surviving and, perhaps even thriving, under conditions of isolation and loneliness. For example the case of Fiorina, the CEO of Hewlett-Packard who accepted the position at HP, given the "famously insular" tradition in the company, and was ostracised by some company insiders. She was quite isolated because she did not take any of her colleagues from Lucent Technologies Inc. with her when she moved to HP. This led Jack Welch, retired CEO of General Electric Co. and one of the world's most admired CEOs, to comment as follows: "I think her job and her accomplishments so far are greater than mine ever were...I always had a good thirty to forty percent of GE in the change process totally behind me. I was an insider. I had an army of friends" (Tung , 2004, p. 248).

Tung (2004) further explores an acculturation model designed by Berry and Kailin (see Fig. 3.2). This model explains four possible modes of acculturation between expatriates (or members of minority) and mainstream cultures.

Integration (i.e. choosing and retaining the best of both mainstream and minority cultures), which is in the upper left hand quadrant, was found to be the most functional mode of acculturation. Assimilation (i.e. unilaterally adapting to the norms and practices of the mainstream culture), which is positioned in the upper right hand quadrant of the model, came second. Separation (i.e. distancing oneself from the mainstream culture) and marginalisation (i.e. rejecting both mainstream and minority cultures) were noted as dysfunctional modes, these are represented in the bottom left and right hand quadrant of the model respectively.

		Cultural preservation	
		YES	NO
Attraction to majority culture	YES	Integration	Assimilation
	NO	Separation	Marginalisation

Figure 3.2 BERRY AND KAILIN'S MODES OF ACCULTURATION

Tung, R. (2004, p. 249). Female expatriates: The Model Global Manager? *Organisational Dynamics*, 33(3), 243-253.

Whilst consideration of both environmental and human behavioural factors is critical, the role that human resources management plays within the international context is as important.

3.5 ROLE OF INTERNATIONAL HUMAN RESOURCES MANAGEMENT

Increasing international activity has resulted in the more extensive use of expatriates and global managers by organisations. Managing human resources in an international context is one of the current challenges in human resources management. According to Ones & Viswesvaran (1999) the numbers

of expatriates are expected to rise given the increasing globalisation of business. Noe et al. (2003) refers to competitiveness as a company's ability to maintain and gain market share in its industry. For any company to be competitive, its human resource management practices need to support business goals and objectives.

Vogel (2006) states that if the preparation, support and training of expatriates are not managed well, the chances of operating at optimal productivity levels are minimal. If the expatriate remains abroad for the full period, about fifty percent still operate at less than optimal levels of productivity. Moreover, Chew (2004) contends that the risk is huge for business survival, as the inability of human resources to communicate and co-ordinate activities in international business, can potentially lead to serious crises within the organisation and threaten the survival of the business.

The South African entry into the world market has brought numerous challenges for multinational organisations and in particular for the human resources function. The investment in relocating employees cost millions of rands. By knowing the factors that drive the performance of expatriates, the return on investment, could be useful and justified. Francesco and Gold (1998) state that organisations can apply three different approaches to the management and staffing of their subsidiaries. These approaches are ethnocentric, polycentric and geocentric and are further described as follows:

- The *ethnocentric* approach is where the home country cultural practices prevail and where headquarters decide on everything and subsidiaries are required to rigidly conform to the home country resource management practices.
- The *polycentric* approach is focused on the autonomy of each subsidiary which manages itself on a local basis. Human resource management practices are thus locally developed.
- The *geocentric* or global approach is applied globally, with an integrated business strategy.

Treven (2001) elaborates on the basic functions of international human resource management, among them recruitment and selection, training and development, performance management, as well as compensation of employees. The first one to be discussed is recruitment and selection.

3.5.1 Recruitment and selection

Recruitment involves attracting a pool of applicants for particular vacant positions. Selection is the sifting process to identify the applicant whose qualifications, skills and competencies that match the job requirements most closely. It is important to recognise the approach (polycentric, ethnocentric or geocentric) in an international organisation, as this significantly affects the type of employee the company prefers. According to Bennett, Aston and Colquhoun (2000) expatriates are used in various capacities within an international context, including the transferring of technologies, entering new markets, transmitting organisational culture, to assist employees to develop skills worldwide. McNerney (1996) states that the importance of the selection strategy is vital as many expatriates are poorly selected, which subsequently influences the success of the assignment. The reason for this poor selection is partly that many companies have not established sound processes for selecting employees to send abroad. The haphazard practices in which certain organisations select expatriates is, according to McNerney, worrisome, to say the least. The focus appears to be mainly on technical skills with little regard for the need of interpersonal skills. It is widely recommended that companies interview the entire family as part of their selection strategy.

3.5.2 Training and development

Gerber, Nel and Van Dyk (1987) state that training and development is part of the broader field of human resources and should form part of the job content environment (nature of the job). The job context environment (management philosophy and working conditions) and external environment (labour market conditions, levels of education, technology and national human resources policy) are very important aspects to be considered in human resources intervention. Whilst this is true of training and development, it goes beyond the

national environment and therefore various strategies need to be applied in an international context.

The role of training and development is critical to ensure adequate resources and skills for any organisation to achieve its strategy (Armstrong, 1996). The development process of an employee includes planning of specific learning needs, formal education, development within the organisation, career development and training. Treven (2001) states that international human resource development professionals are expected to do the following:

- They need to train and develop employees located in subsidiaries worldwide;
- The training programmes need to be tailor-made to prepare expatriates for assignments;
- They need to develop a special group with unique skills to be placed globally;
- They need to create special international human resource development programmes to be implemented, centralised and/or decentralised, depending on the context.

3.5.3 Performance management

Performance management is even more challenging at an international level as it involves the evaluation of employees from different countries, backgrounds, expectations, paradigms and cultures, as well as the increase in cross-functional teams. According to the academic literature, various organisations use teamwork, facilitated by effective leadership, to increase productivity (Barett, 1987; Bettenhausen, 1991; Gallagan, 1988; Hoerr, 1989; cited in Henning, Theron & Spangenberg 2004, p. 26). In trying to be as consistent as possible, another challenge comes to the fore namely, that cultural differences are overlooked. As with other functions, the guiding approach will depend on the organisation's overall human resource management strategy, i.e. a company with a geocentric approach uses the same performance management system on a global scale. Chen (2005)

reports that expatriate success, depends on at least three critical factors namely, adjustment, performance and turnover.

3.5.4 Compensation

Remuneration practices are as important as any of the other human resources practices and have the same challenges as the issue of comparability and cost. Whilst a good remuneration package gives employers a competitive edge in the labour market, it needs to be contextualised and realistic. It is also seen as a retention strategy. The recent developments in the international arena, with regard to human resources, brought about changes in the remuneration field as well. These changes include the use of performance related pay and other contingent reward systems, which is more suited to today's changing world of work.

The traditional pay structures were all related to time and seniority and more appropriate to hierarchical structures and predictable work environments (Brewster et al., 1996). According to Heery (1996) the remuneration practices aligned to performance in the new world of work could potentially be flawed, arguing from an ethical perspective. The increase in employee risk because of a lower guaranteed pay structure and the decrease in independent employee representation, are the main causes for ethical concern. The new pay model is seen as "intentional harm" or penalty and is in contradiction with the basic moral principle in ethics which guards against intentional harm. The new pay model threatens the psychological and economic well-being of employees as it increases the risk of financial instability, possibly leading to emotional anxiety. Sometimes the exchange rate could be advantageous to the expatriate. Many young South Africans, especially students, find that working in the United Kingdom makes it easier for them to repay student loans in South Africa where the Rand is weaker than the Pound. According to McNerney (1996), companies that do not have well developed compensation policies tend to over compensate their expatriates.

The challenge for human resources management is far from over as this phenomenon seems to be increasing, bringing with it even more challenges.

The expatriate, in turn, faces challenges in this global world with the expectations of the organisation to maximise performance.

CHAPTER 4

GROUNDED THEORY

RESEARCH METHODOLOGY

4.1 RESEARCH DESIGN: QUALITATIVE PARADIGM

According to Babbie and Mouton (2002, p. 270) the qualitative research paradigm can be described as a "generic research approach in social

research according to which research takes as its departure point the insider perspective on social action". The authors further state that this perspective is referred to by anthropologists as the emic perspective, or differently stated, it is an attempt to study human actions from the perspective of the individual's experiences.

According to Strauss and Corbin (1998), the term qualitative research refers to any form of research that generates findings not arrived at by statistical measures or any other means of quantification. They further state that "it can refer to research about persons' lives, lived experiences, behaviours, emotions and feelings as well as about organisational functioning, social movements, cultural phenomena, and interactions between nations" (Strauss & Corbin, p. 11). In other words, qualitative analysis is rather a nonmathematical process of making sense of the data at hand. Furthermore, there are many reasons why researchers choose qualitative research as a means of studying a particular phenomenon, such as, the preferences and experiences of the researcher and the nature of the research problem. The latter reason applies to this research where the researcher has chosen a qualitative research method. The current research attempts to understand the meaning and nature of the experiences of persons and as such, lends itself to a more qualitative approach.

Silverman (2001) elaborates on the range of qualitative methods used by a researcher, and he distinguishes four major methods, i.e. observation; analysis of documents and texts, interviews and finally, recording and transcribing. Silverman further states that these four methods are frequently combined to make sense of the data.

Most research in the social sciences is executed within the positivist, interpretive or constructionist paradigms, or a combination of these paradigms. It all depends on the particular research project as well as preference of the researcher. According to Bergh and Theron (2006), positivism is concerned with

external reality. It is mainly used by researchers distancing them from the research. These researchers are said to be objective observers who have tested their hypotheses against experimental and other quantitative methods. The positivistic paradigm involves objective measurement in order to calculate the impact of the particular factors on human behaviour. Bergh and Theron contrast the interpretive paradigm as being concerned with the internal and subjective nature of reality in human beings. This paradigm studies the interaction between people and is doing so, accounts for the reality through these studies. Interpretative and qualitative methods are used in this type of research. The constructionist paradigm assumes that reality is constructed by individuals and groups in the way they think, how they articulate things and in their actions. In post-apartheid South Africa, there is a tendency for social scientist to use the constructionist model because the contextual social factors in human behaviour are accentuated.

4.2 PHENOMENOLOGY

According to Creswell (1998), the history of phenomenology can be traced back from as early as 1859, where the father of the concept, Edmund Husserl, explained phenomenological philosophy. Polkinghorne (1991) states that a phenomenological study focuses on the meaning of the experiences and it

could be described as the exploration of structures of consciousness in human experiences.

Bergh and Theron (2006) found that the term phenomenology was used in Europe and the term humanism was used in the United States of America. This movement in psychology was established in the early sixties as a response against behaviourism and psychoanalysis. This movement embraced psychology as a human science, grounded "in positive aspects of conscious mental activity, incorporating human beings' striving for psychological growth, self-actualisation and autonomy" (p. 23). According to Bergh and Theron, European existentialist philosophers, including Franz Brentano, Søren

Kierkegaard, Martin Heidegger, Karl Jaspers, Edmund Husserl and Jean-Paul Sartre, were the founders of phenomenology. The basic ideology of existentialism is free will, meaning that all human beings determine their destiny and are responsible for their own choices in life. The authors further state that free will cannot be measured in quantitative terms. Phenomenology is rather concerned with explaining and understanding human behaviour within the framework of the human beings own experiences and interpretations.

Babbie and Mouton (2002) confirm that at the core of the phenomenological paradigm lies human consciousness. The presumed analogy is to be found in the human mind. Human beings are continuously developing and reconstructing the everyday interpretations of their worlds. Therefore, human beings are first and foremost conceived as conscious, mindful, self-directing beings and human behaviour is an outcome of how people interpret their world. Schutz (cited in Babbie and Mouton, 2002, p. 29), stated the following:

The world of nature, as explored by the natural scientist, does not mean anything to molecules, atoms and electrons. But the observational field of the social scientist – social reality – has a specific meaning and relevance structure for the human beings living, acting and thinking within it. By a series of common-sense constructs they have pre-selected and pre-interpreted this world, which they experience as the reality of their daily lives. It is these thought objects of theirs, which determine their behaviour by motivating it. The thought objects constructed by the social scientist, in order to grasp this social reality have to be founded upon the thought objects constructed by the common-sense thinking of human beings, living their daily life within their social world. Thus, the construct of the social sciences are, so to speak, constructs of the second degree, that is constructs made by the actors on the social scene, whose behaviour the social scientist has to observe and explain in accordance with the procedural rules of his science.

Bergh and Theron (2006) describe psychology as a history of opposing and, at times, contradicting theoretical viewpoints. The behaviourism and functionalism approach have similar orientations, whereas the Gestalt and phenomenological approach, on the other hand, share similar orientations. These orientations are in direct opposition to each, some focus on past experiences and others on present experiences. These diverse approaches to study human beings allow the researcher to be selective, as well as careful in deciding upon a particular approach. Bergh and Theron (2006, p. 28) state that "the basic aim of industrial psychology is understanding and explaining, as well as predicting and influencing, human behaviour and experience in the work context". Furthermore, the authors posit that the application of psychology in the work context involves many processes. These processes constitute an open system. Moreover, the authors found that an open system has unique characteristics, including the fact that it is dynamic, it grows and changes continuously and it interacts with the various subsystems.

Phenomenology as a school of thought in psychology opposes mass societies, bureaucratic structures and effects of technological development where individuals become alienated and rather support human individuality and freedom. Its underlying principles include authenticity of human beings, positive individuals who find meaning in their existence. Victor Frankl survived the gruesome concentration camps in the war by applying a theory of self-transcendence, in other words, by finding meaning in existence. Zohar and Marshall (2000, p. 18) described Viktor Frankl's philosophy of meaning:

...our search for meaning is the primary motivation in our lives. It is this search that makes us the spiritual creatures that we are. And it is when this deep need for meaning goes unmet that our lives come to feel shallow or empty. For a great many of us today this need is not met, and the fundamental crisis of our times is a spiritual one".

According to Sidani and Sechrest (1996), phenomenology is concerned with studying human phenomena and is a unique philosophy, theory, and method. It embraces a holistic approach, meaning that a person is looked at as a whole

(physical, psychological, social and spiritual aspects) that is different from the sum of his/her parts. Its main focus is the lived experience of individuals in everyday life. As a philosophy and theory, phenomenology is based on a well-defined set of assumptions (Sidani & Sechrest, p. 302):

- Human beings live in the world, in a specific context that exists as an outside object. They perceive the outside world and interact in it. However, their perception of objects, events, and actions or behaviours is not passive, experience is consciously and actively constituted by individuals.
- Reality is, therefore, subjective, perceived and interpreted by an individual. The world becomes real through contact with it. In other words, reality is lived subjective experience. Human beings make sense of the world they see and experience; facts are not taken for granted but are perceived, interpreted and ascribed meanings. Human actions and interpretations of their experience are guided by a “stock of knowledge” handed down to them through language and cultural and social practices.
- Stock of knowledge refers to images, ideas, theories, rules or principles and values, feelings and attitudes that provide resources with which a person interprets experiences, grasps the intentions and motivations of others, achieves inter-subjective understandings and co-ordinates actions.
- Truth is viewed as a composite of the individual's perceived realities. Because these realities derive from the individual's experience, they are based on the person's perceptual skills and preconceived stock of knowledge. As more experience is acquired, perceptual skills are refined and knowledge evolves. Consequently, truth is viewed as constantly changing. In addition, truth is context dependent; it is specific, not universal. Truth stems from an interpretation of experience, which is influenced by the individual's background.

Sidani and Sechrest (1996) further state that through the research process, certain truths or realities are uncovered which is the product of the interaction and agreement between the participant and the researcher. Steps in phenomenological inquiry are not as clear and concise but rather intertwined,

as data collection and data analysis take place simultaneously. It is guided by the following operations:

- *Reflecting* refers to a method used in order to achieve a detailed description of the lived experience by conversing with the participant to collect the data.
- *Bracketing* is a distinguishing characteristic of phenomenology and can be described as acts by the researcher to defer his/her knowledge and bias regarding the phenomenon being examined.
- *Intuiting* requires looking at the experience with an open mind.
- *Analysing* is the method whereby recurrent elements are identified by comparing and contrasting the descriptions obtained from participants.
- *Describing* refers to a comprehensive explanation of the experience or phenomenon by emphasising the key characteristics of the phenomenon.

Phenomenologists focus on the person as a whole and the ultimate aim of phenomenology is to focus on conscious content that is relevant to the given time and given situation. According to Ewen (cited in Bergh & Theron, 2006, p. 358):

The ideas of existentialism and phenomenology in personality psychology derive from people's efforts to transcend or move above or outside themselves, to become people by being open to all experiences and to rise above the harsh realities of life. Reality is only what and how every person lives through his or her own subjective experiences and people cannot be studied outside their context, but rather as "being in the world". People exist in relationship to the world around them (the "Umwelt"), with the social world of other people (the "Mitwelt") and the psychological world related to the self, values and potential (the "Eigenwelt").

Creswell (1998) states that qualitative researchers should advocate the practice of recording their own biases, feelings and thoughts in the research report.

Moustakas (1994) explains that the focus of grounded theory is to unravel the elements of the experience described. The research project has its own unique sequence and detail, which is dependent on the data, the interpretations, the experience of the researcher and all the elements that influence the entire research process. Addison (cited in Moustakas, p. 5) includes the following tenets and practices for researchers using grounded theory:

- Researchers need to continually question gaps in the data-omissions and inconsistencies and incomplete understandings;
- Grounded theory researchers stress open processes when conducting research rather than fixed methods and procedures;
- Grounded theorists recognise the importance of context and social structure;
- Grounded theory researchers generate theory and data from interviewing processes rather than from observing individual practices;
- In grounded theory research, data collecting, coding, and analysis occur simultaneously and in relation to each other rather than as separate components of a research design;
- Grounded theory is an inductive process - theory must grow out of the data and be grounded in that data.

The research methods described could be applied in various contexts, and even in this current study, but the chosen research method for this particular study will be, grounded theory. The reasons for choosing grounded theory are:

- the phenomenon under study is fairly new and the researcher is particularly interested in the “raw” experiences of the individuals;
- the researcher wants to become skilled in the application of a qualitative method;

- the type of research method lends itself to "teasing" out the raw experiences of individuals;
- the researcher believes that this method is most appropriate to answer the research question;
- the study uses phenomenological orientations and cannot be measured in quantitative terms (seeking causal factors to explain human behaviour) by natural science methods, but behaviour and experience should rather be understood in qualitative terms within the framework of human beings own way of experiencing it;
- this method supports human individuality as it attempts to draw out "unique" experiences.

4.3 GROUNDED THEORY

Babbie and Mouton (2002) described grounded theory as an analytical strategy, which is based on building a theory from the ground up by using concepts that ground the entire analysis process. This type of analysis is inductive in nature, as the main emphasis is on "developing and building inductively based new interpretations and theories of first-order descriptions of events" (Babbie & Mouton, p. 273).

According to Strauss and Corbin (quoted in Babbie & Mouton, 2002, p. 498):

A grounded theory is one that is inductively derived from the study of the phenomenon it represents. That is, it is discovered, developed and provisionally verified through systematic data collection and analysis of data pertaining to the phenomenon. Therefore, data collection, analysis and theory stand in reciprocal relationship with each other.

Strauss and Corbin further state that grounded theory can be described as the study of a particular phenomenon, whereby one allows the phenomenon to become known through this process rather than a study where one has a particular theory, which needs to be proven. Corbin and Strauss (1990) argue that grounded theory draws its theoretical underpinnings from pragmatism and

symbolic interactionism. The philosophical and sociological orientations of these methods are not prescribed to be used as such, but the authors share two important principles drawn from these orientations. The first principle is concerned with change as a dynamic social phenomenon. Grounded theory is not seen as static but rather as continually changing in response to evolving conditions and needs to be built into the method as part of the process. The second principle rejects determinism and proposes that the actors ultimately control their destinies by the choices they exercise to respond to conditions. These choices are influenced by their perceptions. Corbin and Strauss conclude by stating that grounded theory seeks both to uncover relevant conditions, as well as to determine how the actors respond to changing conditions and to the consequences of their actions.

Glaser and Strauss (1967) describe grounded theory as the discovery of theory from data, which follows a systematic approach in obtaining the data and analysing it. In his subsequent work, Glaser (2002) found that grounded theory through conceptualisation cuts across various research methods (i.e. experiments, content analysis) and uses all data resulting from the method. They emphasise two most important properties of conceptualisation, namely that concepts are abstract of time, place and people, and secondly, that there is an enduring grip on these concepts.

According to Glaser (1978), grounded theory is described as a process of generating evolving concepts into integrated patterns, which are indicated by categories and their properties. Through a process of constant comparison, it is possible to generate concepts from the available data. Stated differently, grounded theory can be described as the identification and integration of categories of meaning from data (Willig, 2001). Parsons (1968) states that the theory is grounded in the data, which has a key underpinning the research question that the researcher would like to answer. There are five steps in grounded theory, which are not mutually exclusive. These five steps are data collection, data storage, coding, memo writing and outcomes. Figure 4.1 at the end of the chapter explains grounded theory in a form of a diagram as simplified by Siew (2007). The five steps of grounded theory will be discussed in more detail below.

4.3.1 Data collection

The process of data collection and analysis are simultaneous and the initial analysis of data is utilised to shape ongoing data collection (Corbin & Strauss, 1990). By following this process, the researcher can identify recurring categories and at the same time increase the thickness and saturation of these categories, as well as insights into the emerging theory. According to Babbie and Mouton (2002), the three main methods of qualitative data collection are:

- Interviews (basic individual interviews, depth interviews, focus group interviews);
- Observation;
- Use of personal documents (autobiographies, diaries, letters).

Corbin and Strauss (1990) identify very similar qualitative data collection methods which include the following most commonly used forms of qualitative data:

- Semi-structured interviews;
- Participant observation;
- Focus groups;
- Diaries;
- Tape recorded data;
- Verbatim transcriptions.

For the purpose of this research, the narratives of the individuals partaking in the research will be analysed. The individuals will have the freedom to respond to the key research question in their "own" time and space of their choice. The advantage of this type of data collection gives the individuals the freedom to think and write without the pressure of time limits, and also to ensure that there is no unnecessary other pressures on the individuals. Individuals will be given the choice to either share these experiences by means of a telephonic interview or by writing about these experiences.

As stated previously in grounded theory, the data collection and data analysis processes are interrelated and therefore conducted simultaneously. The Psychology Board of the Health Professions Council of South Africa has specific ethical guidelines which will be adhered to at all times to ensure the trustworthiness of the study (Department of Health, 2007).

4.3.2 Data storage

The process of storing data based on the qualitative method is critical as grounded theory categories are derived from the data and its accurate storage of which the latter is an advantage of qualitative research. As all data is verbatim or in narrative form, it implies the elimination of incorrect data storage. The narratives will be stored in its original electronic format as provided by the individuals.

4.3.3 Coding

Strauss and Corbin (cited in Babbie & Mouton, 2002, p. 499) categorise two main processes when using grounded theory analysis, which includes coding procedures and adjunctive procedures. Coding has two basic procedures, namely asking questions and making comparisons. The process involves using parts of the text to segment it for coding or labelling purposes. The aim of coding is to give the text some meaning by categorising the text. Coding can be divided into various types of coding, i.e. open coding, axial coding and selective coding. Open coding refers to "the creation of certain categories pertaining to certain segments of text" (p.499). After categories are found, axial coding is applied to find links. Finally, selective coding is applied to establish core categories from the links found.

Glaser (1978) argues that coding as a process can be time-bound in order to get an idea of the frequency of occurrences of the phenomenon under study, in addition to "the how" and "the when" of these occurrences of the

phenomenon as well. Pidgeon, Turner and Blockley (1991) suggest that the first major analytic phase of the research has to do with creating the codes as the researcher studies the data. They further state that this phase is pivotal in collecting data and developing an emergent theory to explain the data, as data in its initial phase is broken down by asking simple questions.

4.3.4 Memo writing

Memo-writing entails making comparisons. According to Pidgeon, Turner and Blockley (1991), memo-writing compares one respondent's experiences with that of another. Through this process, the researcher will be able to identify major- and minor categories. Strauss and Corbin (cited in Babbie and Mouton, 2002, p. 501) describe memos as the audit trail or the official records of analysis on how the researcher formulated the theory. Three types of memos are described in grounded theory, which include code, theoretical and operational notes. The researcher will ensure that detailed memos are kept in order to enhance objectivity, validity and reliability. Corbin and Strauss (1990) found that writing theoretical memos creates a system whereby the researcher can keep track of all the categories, properties and generative questions, which evolve from the analytical process.

Charmaz (2006) found that a useful memo is not necessarily defined by a single procedure. Whilst memos vary, the author gives further guidelines in memo-writing, (p. 82) as follows:

- Define each code or category by its analytical properties;
- Spell out and detail processes subsumed by the codes or categories;
- Make comparisons between data and data, data and codes, codes and codes, codes and categories, categories and categories;
- Bring raw data into the memo;

- Provide sufficient empirical evidence to support your definitions of the category and analytical claims about it;
- Offer conjectures to check in the field setting(s);
- Identify gaps in the analysis;
- Interrogate a code or category by asking questions of it;

4.4 SAMPLING

According to Babbie and Mouton (2002) social research is often performed in situations where one is unable to select the kinds of probability samples used in large-scale social surveys. A sample can be defined as a subset of a particular population or larger group of people observed, to be able to assist in drawing conclusions about the nature of the total population. The individuals who will make up the sample will all be expatriates living abroad, or those who have had the experience of expatriation. These individuals will not be confined to a particular gender, religion, sexual orientation, age group, country, marital status, or organisational link, but emphasis will rather be on accessibility of the individuals who will be able to articulate their experiences clearly. These interviews will be conducted using electronic mail, as this is the most reliable form of communication given time differences and other technological quality problems, which could have an impact of the final quality of the information. The purpose of the interview is to gain insight into their unique experiences of expatriation.

Babbie and Mouton (2002) describe non-probability sampling as the type of sample, which lends itself to the social situation, or differently stated, the situation often dictates the way in which one is able to select a sample. There are four types of non-probability sampling (reliance on available subjects, purposive or judgmental sampling, snowball sampling and quota sampling).

For this current research, purposive or judgmental sampling was used where the researcher chooses the sample based on individual judgements and the purpose of the study. Snowball sampling, in this particular study was also applied, as the respondents were mostly located overseas and the researcher requested the current respondents to provide contact details of more respondents living overseas.

The general rule of thumb for conducting a study in the interpretive paradigm at a master's level, the sample should be between five and twenty (Babbie & Mouton, 2002). Interviews were conducted with about twenty individuals using electronic mail as the main tool of communication. The interview with each respondent was an open interview, allowing the respondent to speak freely and openly, rather than providing the respondent with predetermined hypothesis-based questions as one would find in quantitative research. Narratives were used as raw data and evidence of the experiences recorded by the interviewees. Where necessary, guiding questions will be used to extract information, and follow-up sessions will be conducted when required. This method allows interviewees to respond in their own time and in the comfort of their chosen space, to reduce the pressure being required to respond to a question within a given timeframe.

Criticism against this particular type of data gathering could be that the interviewee cannot express himself or herself by using written words. Caution should be taken from the researcher's side at all times when analysing the data. The researcher attempted to overcome this shortcoming by trying to eliminate individuals who found it difficult to articulate these experiences.

4.5 RELIABILITY

Babbie and Mouton (2002) describe reliability as the quality of the measurement method whereby "the same data would have been collected each time in repeated observations of the same phenomenon" (p. 646). In other words, should one use the same technique constantly, it should yield the

same result. The authors warn that reliability does not necessarily guarantee accuracy. In social research, this is a true concern, especially when a single observer is the source of data coupled with the subjectivity of the observer. Several techniques to ensure reliability in social research are suggested: (Babbie & Mouton, p. 121):

- Should the researcher ask for information from the respondents, caution should be taken to ask respondents questions they can answer.
- The researcher should be clear in what he/she is asking and the relevance of the questions.
- These techniques include test-retest methods, split-half methods, using established methods which have proven reliability in the past.
- The reliability of research workers is relevant. It is recommended that all audit trails of the entire process is available and that the supervisor could call for a sub-sample to verify selected pieces of the data.
- Clarity, specificity, training and practice will avoid unreliability and grief.

Haig (1995) describes reliability of data as a confirmation of the existence of a particular phenomenon. The process to establish reliability involves: experimental and statistical control; replication of the process; calibration of instruments to be used; empirical investigation of equipment, and finally, statistical analyses for data reduction purposes. This particular study being qualitative in nature will not be subjected to statistical reliability and validity assessments.

Reliability, as described by Pandit (1996) requires demonstrating that the operations of a study, if conducted again, should yield the same results.

The data for the current research purposes were gathered using interviews, and to increase reliability after interpretation, the author's interpretation will be returned to the individuals partaking in the interviews to confirm the accuracy, understanding and interpretation of the data. By implication, the interviewees' confirmation of the information could demonstrate reliability.

4.6 VALIDITY

In its most basic definition, Babbie and Mouton (2002) describe validity as the, "extent to which an empirical measure adequately reflects the real meaning of the concept under consideration" (p. 122). Silverman (quoted in Babbie and Mouton, 2002, p. 124) describes validity in the following way in the context of in-depth interviews:

If interviews are to be viewed as subjects who actively construct the features of their cognitive world, then one should try to obtain inter-subjective depth between both sides so that a deep mutual understanding can be achieved.

Objectivity in the qualitative research paradigm places a different challenge and level of responsibility on the researcher, in that, the researcher is viewed as the most important instrument in the process and acts as an observer and/or interpreter. Objectivity in this context means something different in the sense that the researcher needs to gain trust and try to establish a rapport with the participant. The ultimate aim of the researcher is to generate truthful and credible inter-subjectivity (Babbie & Mouton, 2002).

Kirkpatrick (1995) gives various meanings to the word *valid*, including "well-founded, well-grounded, substantial, reasonable, logical, justifiable, defensible, credible, ..." (p. 874). To ensure validity, the researcher will validate the findings continuously, ask objective questions of the respondents as well as verifying the data with the respondents, and finally, consult an expert in the field of grounded theory.

Babbie and Mouton (2002) found various criteria for success in validity. These criteria include face validity (measures not conforming to our common agreements, understandings and mental images), criterion-related or predictive validity (some external criteria is used), construct validity which is based on logical relationships among variables and content validity which is concerned with how much a measure details the range of meanings.

The Dutch philosopher, Adri Smaling (cited in Babbie & Mouton, 2002, p. 274) defines objectivity in the qualitative paradigm as follows:

It is possible to define objectivity at a higher level of abstraction, where paradigms are no longer determinant of the nature of objectivity, but rather as doing justice to the object of study.

For the purpose of this research an interpretive paradigm was used and it was further useful to consider elements like triangulation, writing extensive field notes, member checks, peer reviews, reasoned consensus and audit trails when enhancing validity and reliability. A discussion of these elements follows:

- *Triangulation* refers to the use of multiple methods to reduce personal bias by putting together the investigators, as well as the methods in the same study.
- *Extensive field notes* need to include environmental notes in which the study takes place, as well as theoretical memoranda.
- *Member checks* can enhance validity and reliability by taking it back to the respondents and check with the respondents whether the transcripts and analysed results truly reflects what they have said.
- *Peer reviews* ensure that, through consensus by more than one researcher, the meanings do reflect what respondents were saying.
- *Audit trails* can also enhance validity and reliability as the researcher hands over all notes, raw data, interpretations, theoretical ideas, and any correspondence in this regard to an independent examiner who can study these documents.

Smaling (cited in Babbie and Mouton, 2002, p. 274) states further that objectivity, reliability and validity are all "bootstrap" conceptions, as these can never be truly attained, but the researcher should always strive towards this goal.

4.7 CRITERIA FOR GROUNDED THEORY STUDIES

Charmaz (2006) identified key criteria for grounded theory studies, namely credibility, originality, resonance and usefulness. Each of these criteria will be described with critical questions for each criterion.

Credibility asks critical questions including, but not limited to: whether the research achieved intimate familiarity with the topic; were comparisons made; and whether the categories cover a wide range of empirical observations.

Originality asks whether the categories are fresh and what the social and theoretical significance is of the work.

Resonance asks whether the categories portray the fullness of the experience and whether the grounded theory makes sense to the respondents or people who share their circumstances.

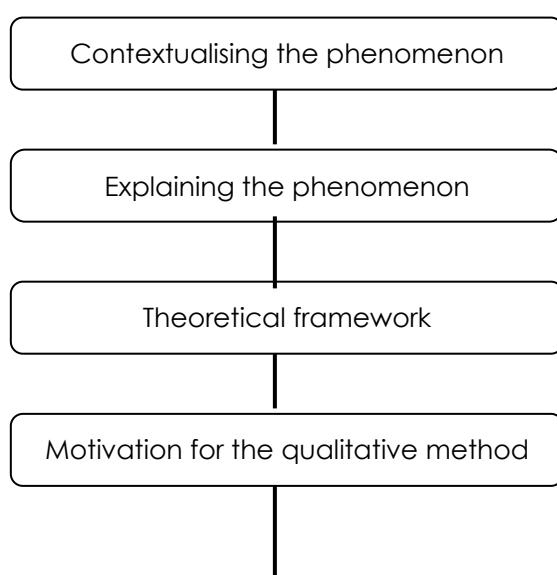
The usefulness criterion asks whether the analytic interpretations offered to people can be used in everyday settings, and how the researcher's work can make a contribution to knowledge.

4.8 CRITIQUE ON GROUNDED THEORY

One of the critiques of grounded theory could be that there is low external validity meaning that there could possibly be a challenge to generalising findings to different situations and experiences of the same phenomenon. This type of method requires some level of skill, which can be risky when the researcher interprets data. Silverman (2001) states that grounded theory have not recognised implicit theories, which are used as a guide during early stages.

4.9 RESEARCH DESIGN

The research procedures and process will be applied in terms of certain steps that are illustrated in Figure 4.1 and Figure 4.2.



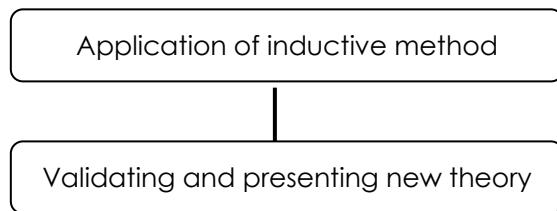
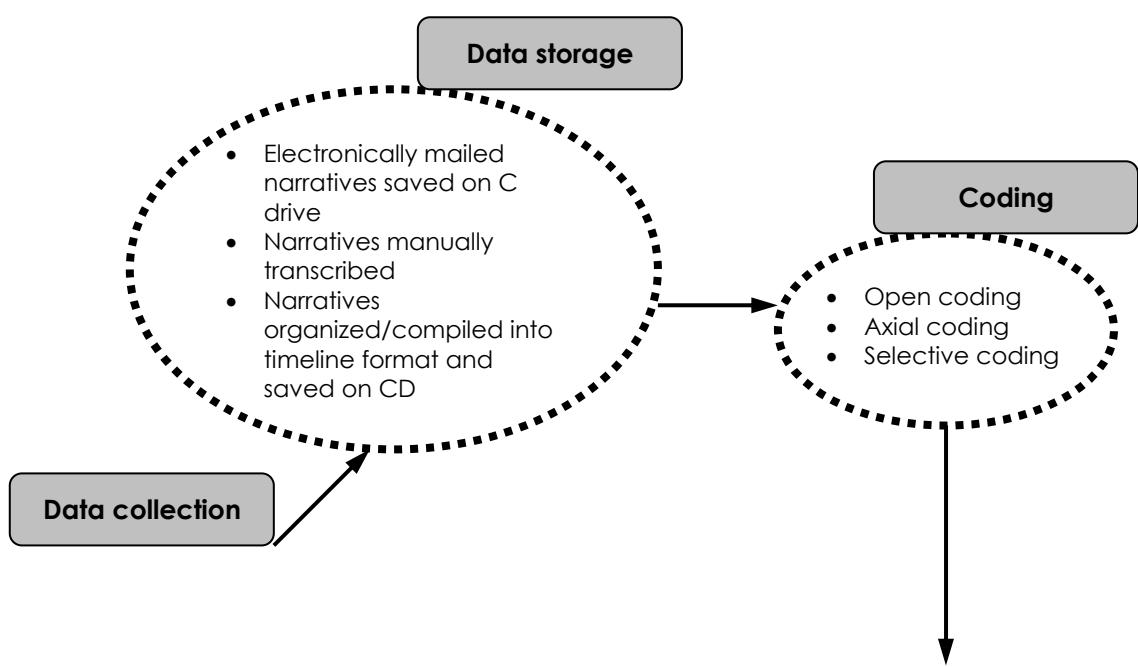


Figure 4.1 SEQUENTIAL PLANNING OF RESEARCH PROCEDURES



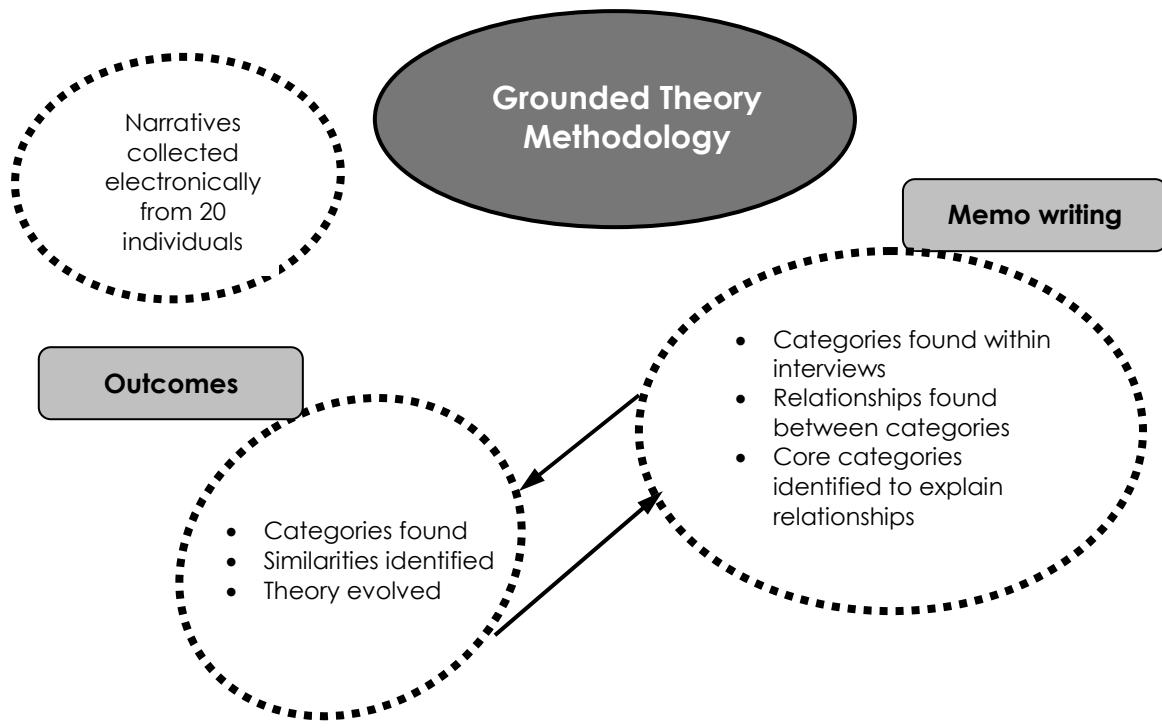


Figure 4.2 GROUNDED THEORY METHODOLOGY APPLIED IN RESEARCH DESIGN

Siew, E. (2007, p. 172) *Womanism: Empowerment of the other*. Unpublished master's thesis, University of Stellenbosch.

CHAPTER 5

EXPATRIATE EXPERIENCES: INTERPRETATION OF DATA

"The goal of human life is surely to survive, but it is also to flourish, that is, to fulfil our dreams and aspirations. To achieve anything, to defend our stake or to

extend our vistas requires a quality of character that is pivotal to all human enterprises. I am referring here to courage, the endeavour to persist, fortitude, the active will-to-endure, the achievement motive, and the stout determination to fulfil our goals and exceed our natures" (Kurtz, 2000, p. 87).

The purpose of this study was to gain a deeper understanding of the shared experiences of those who have taken the proverbial "first steps" into the novel and unknown. They are called 'expatriates'. For the purposes of this study, the Wikipedia definition of an expatriate was accepted. An expatriate is defined as an individual who temporarily or permanently relocates to another country and culture, different from that of the individual's upbringing and/or legal residence. The origin of the word comes from the Latin word 'ex' meaning 'out of', and 'patria', meaning 'country of origin' (Retrieved 18 January 2008 from <http://en.wikipedia.org/wiki/expatriate>).

Twenty individuals were interviewed. The particular research methodology applied to extrapolate meaning and transfer the meaning into theory, was grounded theory. Grounded theory is particularly useful when the depth of an experience and the full meaning needs to be uncovered. Table 5.1 below contains information obtained from the respondents during the interview process.

TABLE 5.1 BIOGRAPHIC INFORMATION OF RESPONDENTS

	Date	Country of experience	Respondent Coding	Age (years)	Gender	Context
1	22/11/07	UK	BL	36	Female	Corporate relocation
2	21/04/08	UK	IS	40	Female	Personal relocation/ personal decision
3	13/09/08	USA	JL	43	Male	Corporate relocation
4	11/11/07	Australia	SR	40+	Female	Personal relocation/ personal decision

5	13/11/07	Australia	KM	40+	Female	Personal relocation/ personal decision
6	23/04/08	Australia	HW	26	Female	Personal relocation/ personal decision
7	23/02/08	New Zealand	CC	40+	Female	Personal relocation/ personal decision
8	04/08	Australia	LE	40	Male	Corporate relocation
9	08/08/08	Hawaii	GN	42	Male	Corporate relocation
10	13/11/07	UK	JD	40	Male	Personal relocation/ personal decision
11	30/05/08	Australia	AE	35	Female	Personal relocation/ personal decision
12	13/11/07	UK/India	VGA	40+	Male	Personal relocation/ personal decision
13	25/02/08	UK/ Netherlands	SM	37	Female	Personal relocation/ personal decision
14	03/09/08	UK	MJ	23	Female	Personal relocation/ personal decision
15	14/09/08	UK	BM	41	Female	Personal relocation/ personal decision
16	08/09/08	UK	LS	23	Female	Personal relocation/ personal decision
17	06/09/08	Saudi Arabia	VVP	46	Male	Personal relocation/ personal decision
18	04/09/08	New Zealand	SJ	40	Female	Personal relocation/ personal decision
19	09/09/08	Australia	DTM	41	Male	Personal relocation/ personal decision
20	06/09/08	Saudi Arabia	ET	46	Male	Personal relocation/ personal decision

5.1 BACKGROUND ON INTERVIEW

The initial contact made with respondents/individuals started in 2007, and the first response received was 11 November 2007. In total, twenty individuals were interviewed. As indicated previously, the individuals who were selected for the sample were either expatriates living abroad or those who have had the experience of expatriation. These individuals were not confined to a particular

gender, religion, sexual orientation, age group, country, marital status or organisational link, but preference was given to the accessibility of these individuals and their ability to articulate their experiences clearly.

These interviews were conducted using electronic mail, and in some cases, follow-up interviews were done telephonically. The selection of this form of communication tool was because electronic mail provided the most reliable method to communicate, given quality problems with technology and time differences, which could impact negatively on the final quality of the information obtained. This means of communication allowed the individuals to think in their own time, space and provided them with more 'freedom' when answering these questions. Furthermore, this mode of communication hopefully allowed individuals to hopefully express their feelings openly, with no interferences/interruptions from the interviewer. There is, however, a limitation in this mode of communication because key nuances/tones are lost when one does not hear the voice and see the facial expressions of these individuals.

The common factor amongst all the individuals was that they had all experienced expatriation at one point in their lives. Seventy percent (70%) of these respondents (BL, IS, JL, SR, KM, GN, JD, AE, CC, VGA, BM, VVP, DTM and ET) are currently still experiencing this phenomenon, whilst a smaller group of individuals (LE, HW, SM, MJ, SJ and LS) have returned and are now referred to as repatriates. It is important to note at this stage that this difference within the group could be viewed as a distinguishing factor, as it might or might not have had an influence on the respondents' experiences. The importance of this is viewed as part of the contextualisation of the experience. The demographic profile of each individual contributes to the uniqueness of this particular experience and will be discussed in more detail in the next section.

5.2 DEMOGRAPHIC PROFILES OF RESPONDENTS

The demographic profiles of the individuals were vastly different. The **gender** of individuals was dominated by females, with 60% being female, and 40% being male respondents. With the exploration of the expatriate phenomenon, the

interviewee's age could assist in identifying the particular stage he/she experiences in their career. The **age** group of individuals ranged from 23-46 years of age. Only 15% of the respondents were within the age groups of 20 to 30 and 30 to 40. The majority (70%) made up the 40s and 50s age groups.

Although the question of **children** was not directly asked, 40% of the respondents talked about their children and the impact the experience had on them, i.e.

- JL: "The family (wife and 2 children)..."
- GN: "...since my kids are young..."
- IS: "... and son are ..."
- CC: "...the future for their children."
- AE: "...for the sake of my children."
- KM: "My children understand..."
- SM: "...and my son growing up in a foreign country."
- SR: "...better opportunities for children."
- SJ: "...my kids couldn't attend school..."

It was noted that 50% of the respondents were **married** or in a long-term relationship. This was drawn from their specific reference to their spouses sharing their experiences. This was not a pertinent question because the assumption was made based on the statements regarding family.

- JL: "The family (wife and 2 children)..."
- GN: "...more time with my wife and kids."
- IS: "My husband and son are on a British passport."
- CC: "My husband felt that it was the right thing to do."
- AE: "My husband had met this nice guy at work"
- KM: "My husband been a high school teacher..."
- SR: "...to be with my partner..."
- SJ: "...my kids couldn't attend school."
- JD: "It took us two years making the final decision."
- LE: "Another important factor for us is the decision to sell our house or not."
- WP: "...between me and my wife."

The **contexts** of these experiences are extremely important as it has an influence on the entire experience. Only 20% of these respondents were **relocated** by their organisations, falling into the category of 'corporate' relocations, and bringing a different context to their experiences. Corporate relocations are supported and at times initiated by the organisation. Organisational support is therefore an expectation and contributes at times to the overall success or failure of the assignment. The other 80% of respondents relocated themselves and it was a personal choice they had made. The respondents were from diverse backgrounds, with approximately 50% from **previously disadvantaged backgrounds** (JL, AE, KM, SJ, JD, LE, HW, LS, BL and MJ) as defined by the Employment Equity Act, Act 55 of 1998. The diversity, and in particular, the race group of respondents is viewed as significant in the context of this study, as the political climate influenced the decision of expatriation in some way or the other. The following statements echoed the significance and spirit in which these experiences were revealed:

- CC: "...refuse to stay in a country where there is a black government as they consider themselves to still be the 'chosen race'."
- KM: " equal opportunities for their children in a country that does not see colour or race "
- LE: "You loose or become less preoccupied with race "
- WP: "White South Africans leaving RSA is a common occurrence and something on most people's minds "
- HW: " so meeting them, all white, ... differences that still today keep us apart, but once you're in another country the fact that you're South African means we're all the same "
- VGA: "Socio-political "
- DTM: " discrimination against white persons in the job market "
- MJ: "As you know each and every country has its history, just like us. Everyone knew what 'apartheid' meant and wanted to know the story. It struck me that people from their different country have a history, especially the Eastern Europeans."

The statements made by various individuals were all very noteworthy and contributed immensely to the broader context of the responses. These were not the only demographic factors that were observed, but the most relevant in the context of this study. The next section will elaborate on the analysis of the responses.

5.3 KEY CATEGORIES

The analyses discovered firstly that these experiences were truly unique, and that each individual made this decision to some extent for personal reasons or personal gain. The following core categories surfaced from the responses, and each category will be discussed in more detail namely, career opportunities, positive attitude/frame of mind, travel opportunities, financial freedom, spirituality, family and friends support/non-support, alienation/the unknown, openness to experiences/embracing change, safety and security, patriotism, and cultural empathy/acculturation.

5.3.1 Career opportunities

Career as part of the entire experience of expatriation can be singled out as one of the key drives why individuals are making this decision and challenging the “unknown”. The individuals who were part of the study have been in different stages in their career, spanning from the early twenties to their mid to late forties. The twenties age group comprised of only 15%. According to Greenhaus et al. (2000), these stages (stage one and stage two) in one's career, involve some degree of exploration. In stage one, the choice of occupation and preparation for the working world is of importance, and the personal changes an individual experience, could be the search for and development of an occupational self-image. The exploration continues in the form of assessing alternative occupations. The second stage is known as *organisational entry*. The main focus of this stage is for the job seeker to obtain employment from various organisations and engage in selecting an appropriate job, based on assessment and accurate information.

HW: “Work was different because I found myself doing a lot of community audits, ...absolutely awesome.”

Whilst some of the academic literature guides us in understanding these career stages, it is imperative that one contextualises these experiences by taking the South African environment into consideration. There are factors unique to the

South African environment which could have shaped and influenced these experiences namely the political environment, the economic environment and practices of affirmative action. These are but a few, but there is certainly not an exhaustive list.

The 40s and 50s age group could be classified as the mid-career stage (i.e. Stage Four) where 70% of the individuals were grouped. Stage Four is the stage focusing on developing and enhancing ones competence and pursuing ones dreams. Whilst the typical activities individuals in this stage should undergo such as the reappraisal of the career and early adulthood as well as the reaffirmation of the dream career and/or the modification of the dream career, it was noted that this was not the experience of the group of individuals included in this study. Many other factors, such as crime and the opportunity to enhance their economic status played a role in their decision to expatriate. For some, it seemed as if they experienced that their dreams were shattered (CC: "... limited career advancement").

The general sense of this decision for the enhancement of their careers was experienced as positive, enriching and a personal aspiration., was reported by the following individuals.

- JL: "...was assigned to work at our Company Global Headquarters
... on a Resident Expatriate assignment."
- IS: " Work Opportunities..."
- CC: "Job opportunity..."
- SR: "Better opportunities for themselves..."
- LE: "Because there are not such huge discrepancies between the different occupations, you tend not to define yourself in terms of your job anymore."
- WP: "Work / career advancement opportunities..."
- SM: "It is so much easier to find work..."
- DTM: " Limitation on promotions and job security."
- LS: "In the UK there are more job opportunities."
- BM: "...lack of opportunity for further education and professional development for myself."
- BL: "Better career prospects..."
"You grow literally in every possible aspect of your life: ... professional ... you name it!"

5.3.1.1 Career altering opportunity/pioneering experience/ professional development

For some of these respondents, it was more than an opportunity to advance their career; it was an opportunity to gain global experience, as illustrated by statements such as:

- LS: "...gaining international experience in my career."
- BL: "Better training and development opportunities, international exposure."

They viewed this prospect beyond the obvious opportunity of enhancing their career. Some of the respondents went further than the improvement of career opportunities and used this opportunity to change a career as in the case of JD: "changing my career". This was a rather career altering experience, as it is an opportunity of a lifetime, which rarely presents itself. A few individuals made this decision to gain additional competence in their various professions, and were experiencing disappointment with the opportunities in their profession. These experiences were echoed in the following statements:

- VGA: "...new professional experiences."
- BM: "...became disillusioned with the way medicine was practiced in Africa..."
"...it is advantageous for the sharing of ideas and for gaining competence."
- ET: "it is difficult to keep abreast technically-seminars-CPD."

The main objective for these individuals was to be at the forefront of new developments in their careers thus they took their career development seriously.

5.3.1.2 Ambition/achievement-orientated

Expatriation is not considered a passing trend, with forecasts of increasing international mobility over the next decade and well into the third millennium, expatriation is viewed as an increasingly common work experience (D'Andrea, 2006). Globalisation has created more opportunities for individuals in the world of work, and the typical achievement-orientated career person will most

probably make use of these opportunities as this could possibly 'still the hunger' to their sense of career achievement.

One of the sub-categories, which emerged from the data was that these individuals are typically very ambitious, driven, goal-orientated individuals who want much more from life than settling for second best. This experience was indicated in some of the responses such as:

VGA: "I was offered a job overseas which is something I always wanted to do (work overseas) for me career was the driver."

For this respondent, as mentioned in his own words, this was one of his lifelong dreams, and here was an opportunity to fulfil this dream. These types of individuals are visionaries, possessed of extraordinary energies. Often their extraordinary drive for achievement is as a result of frustration and traumatic experiences that might dissipate or burn out other personalities. We call them Prometheans and their temperament is highly competitive and assertive, with the ability to adapt easily. One of the individuals made a pertinent remark when given a reason for his expatriation: "I went out of choice for my career" (VGA), stating the competitiveness and determination. By this comment, he signified the importance a fulfilling career, in that he would leave the known behind and settle elsewhere for the sake of his career. Having well-defined personal and professional goals would certainly assist with achieving the end goal while staying motivated throughout.

One of the respondents revealed that this was always part of her career development plan when she stated: "I am on an international career development assignment – this was always part of my career plan" (BL). One respondent echoed the sense that this opportunity of expatriation had given him the opportunity to reach his ultimate career goals when he mentioned: "Changing my career and being able to get sufficient training within one year" (JD). The expatriation experience afforded this respondent the opportunity to change his career completely. He would not have been able to do so if he did not accept this lifetime opportunity. Another respondent commented that one should not wait for better days, but rather create opportunities and make things

happen (MJ: "Waiting on better things to happen. Realising that things will never happened to you if you don't make a good choice"). This indicates that these individuals did not take up these opportunities arbitrarily, but it was part of a bigger plan in their lives, which they had carefully thought about and knowingly took action to meet their career goals.

As a career is seen as a central part of a person's life, it is generally expected that it will bring fulfilment in a different way and that one could feel "complete" in some sense should your career provide this kind of fulfilment. Whilst most of the individuals had opportunities available in South Africa, it seemed from their responses that these were just not satisfying and adequate. One respondent indicated that she wanted to explore additional opportunities in terms of her career (SM: "The experience field is wider and opportunities are more"). This respondent wanted to explore these additional opportunities/more choices in terms of her career. She further reported that "...overseas employers offer more..." (SM) clearly demonstrating that there are opportunities in South Africa, but that there are more opportunities abroad. She wanted to have these options available to make the appropriate choice. One of the underlying reasons why South Africans decided to grab these overseas opportunities is the fact that the countries they chose were first world countries. This allows them so much more to choose from.

SM: " first world countries and their conduct of business is ahead of time, more efficient and well structured "

LE: "In most 1st world countries there are simply more jobs than people. This allows you to choose from a wide variety of jobs, thereby allowing you to gain the maximum benefit form your qualification "

BM: "...worked in another country at some point...is advantageous for the sharing of ideas "

These comments further indicate that they would not settle for any country overseas, but would be deliberate in their choice of country, as this choice needs to fulfil some of their requirements in terms of options available and advancement in their career.

5.3.2 Positive attitude/frame of mind

Throughout the responses, a strong emphasis was on their outlook toward life in general, and how this mental state or outlook could influence the experience of expatriation either positively or negatively. The decision to relocate was a purposeful decision for most, and it seems that they had prepared themselves psychologically in the sense that they told themselves that the experience would be as positive as what they make of it. One of the respondents' commented as follows:

AE: "...it comes down to what you make of it. You are ultimately the only one in charge of how things work out for you in the end. I've made the conscious decision to live my life as best as I can here"

The sense of one's influence, thoughts, perceptions and feelings about this experience will be as positive as what the individual makes of it. Another respondent commented as follows: "I think one is responsible for oneself first" (SM). This indicates that this decision and how it is experienced depends largely on oneself and what the individual makes of it. Another person clearly stated that the right mind-set would ultimately determine the success of the entire experience (VGA: "The right attitude – I am not being flippant, but everything comes down to this"). The strong sense of the particular frame of mind of the individual and his/her perception of the experience also came to the fore (VGA: "Relocation is what you make it. It all stems from the attitude that you go with"). Another respondent had the same mental view when sharing her experience (SR: "You have to have the right attitude"). Some individuals said that they would do this over again, as this experience was all worth it and shaped their lives immensely, as stated by these individuals

MJ: "This was the greatest and biggest journey of my life and the greatest experience"

LS: "...all things that I won't mind experiencing again"

Yet another individual commented on attitude: "...but this is very dependent on your personal approach and attitude" (BL). All these responses centre on the notion that the experience will be what one makes of it.

Psychologically, to bring this kind of disposition to the experience of the unknown, the unidentified, the indefinite, the unfamiliar, indicates a certain kind

of personality - the kind that views the unknown as a challenge. Moreover, this kind of personality trait will most probably be described as one with a high propensity of risk-taking. Such a person will be someone who knows what he/she wants from life and is not intimidated by going after it; a person without any predetermined expectation but is open to what comes their way.

5.3.2.1 Positive experience

Whilst a greater number of respondents testified that the experience was very positive in general, there were a few that commented on this experience being slightly depressing (SM: "It was tough starting out..."; HW: "...terrified and yet oddly excited"). As for the rest, they were optimistic about this experience in general, and although there were challenges and some negative experiences, the positive experiences far outweighed the negative experiences. This sentiment can be illustrated by the following comments:

- BL: " Honestly when all is said and done the positives far outweighs the negatives... – looking back now – I will do this all over again - this is fun!"
- WP: "Overall is a positive experience"
- SM: "..., but for the rest it was an experience well worth while"
- GN: "The positives to me far outweigh these few setbacks, ...Expat assignments always sound great, and in my case this is the case, but I'm sure not for everybody"

Some of the individuals described this experience with great enthusiasm:

- AE: "You feel that you are in heaven"
- GN: "...but it does require a lot of effort on your part"
- HW: "... oddly excited ...
I saw another part of the world, gained experience I would never have gained in SA, met some fantastic people and I'm a better person for it"
- SR: "Great country, lots of opportunities"
- SJ: " It was wonderful while it lasted!"
- BM: "I would not change the decision"

Notwithstanding all the challenges faced during this experience, it is certainly a unique attribute of these individuals who viewed this experience in such a positive manner.

5.3.2.2 *Quality of life - reinforcement of family time and values*

Despite the fact that the value of spending time with family and quality of life were not pertinent questions asked, it emerged as an "added" benefit as most of the expatriates did not make this decision for this reason (relocating to spend more time with my family). This seemed to emerge as a supplementary gain to the main reason/s for relocation. It was likely also "unexpected" in a sense. This awareness can be illustrated by the following comments:

- GN: "Probably good. Definitely spend more time with my wife and kids over the weekend since there are not strong 'routine' type activities demanding ones attention.
"One tends to do more as a family as you visit places and attractions"
- IS: "The one thing that is really good over here is that there is ample to do for the children and not just the usual sightseeing you would do as a tourist. There are Safari parks over here that you can visit but within the park they have facilities for children to be kept busy with like miniature roller coasters, etc. The parks also stay open throughout the year and only close for a period of a month or two due to maintenance work that needs to be carried out"
- BL: "When you move overseas, it does not only change your life but it changes the life of all of those around you"
- JL: "All in all, it has been a positive experience and has brought our family closer together"

The comment, "...my children understand the suffering of people in Zimbabwe and other countries..." (KM), seems to imply that she (the mother) now has more time to spend with her children, she can teach them values and she can share knowledge with them for which she previously never had the time. This opportunity allowed her to spend more time at home now, which was not the case when she was in South Africa: "For the first time ever I can afford to stay home and only work 4 days a month" (KM). She commented on the deeper values, appreciation, wisdom and knowledge her children now possess by stating: "They (my children) are more independent and wise; they know a lot about other countries, their beliefs and cultures; and they have respect for people. They have learnt that all people are equal and that status or money does not mean much" ("KM).

The ability for parents to impart values to their children is extremely rewarding, and it can be viewed as lasting. These values are passed on to the future generation, making the experience so much more valuable than ever anticipated. Another respondent commented favourably on the family times and values in this statement: "Given limited circle of friends and no family, the family spends a lot more time together than when we were in South Africa. This has been good and I think we understand each other a lot better now. In general, family and individual values have not changed" (JL). One respondent commented on the relationship between him and his wife being solidified: "It strengthened the bond between me and my wife..." (VVP).

The general observation is that values probably got stronger as this experience allowed family to spend more time with each other, most probably not all the time out of choice, but because they needed to support and relied on one another during these trying times.

5.3.2.3 *Self-sufficiency*

This particular acknowledgment regarding self-sufficiency was mentioned in two different contexts; by parents experiencing how this decision has built the character of their children, and on the other hand from the younger group of expatriates (among 20-30 year old group) themselves. The exploration phase and developing an occupational self-image is common in this stage of individuals. Typical statements echoing how this decision of expatriation shaped their lives included:

MJ: "London taught me how to be independent, how to do things on my own... Yes, it was difficult but how are you going to grow up when someone is always spoon-feeding you."

LS: "I am more independent. I've learned to 'survive' on my own... Now I am more 'grown up'."

The other category of people commenting on the added benefits of this experience included statements from parents who noticed how their children grew from this experience:

KM: "They (my children) are more independent."

SM: "...my parents helped me grow-up with independence..."

JL: "...has grown in maturity and confidence. These experiences brought about maturity, independence, self-reliance, self-confidence for various individuals and families."

5.3.2.4 *Life changing/enriching*

When one endures some kind of hardship, there is the hope of reward at some point in this journey. The general thinking of "every dark cloud has a silver lining" seems to describe this kind of expectation better. Whilst the idiom was not verbalised by the respondents, they certainly commented on the life changing experience in an encouraging way, as stated by one of the respondents (HW: "... gained experience I would never have gained in SA, ... and I'm a better person for it"). This experience was not only life changing in some form or the other, but it was also experienced as an inspiring, affecting, stimulating, invigorating and revitalising experience (HW: "So to sum it all up, I had the most wonderfully enlightening experience overseas"). One of the respondents commented, "... this was until now one of the most enriching experiences of my life" (BL) clearly stating that the impact this experience had on her life, was lasting and invaluable.

This life-changing experience was not necessarily viewed as positive, nor as negative, but it was rather viewed as altering your life, and this altering was of significance: "It changes your life one way or the other" (VGA). Whilst this was mentioned earlier under the category of quality family time, it is viewed to be appropriate in this category as well when one of the respondents stated the benefits it had for the broader family: "They (my children) are more independent and wise, ... and they have respect for people. They have learnt that all people are equal and that status or money does not mean much" (VGA). This experience was therefore not only beneficial to the individual, but also in some instances to the wider family, giving it so much more depth than ever imagined.

One of the respondents commented that she grew as a person; she grew stronger in her values and beliefs. It accentuated the role her parents played in her life and what they taught her: "It showed me the reason my parents taught me certain things and why" (LS). This experience gave certain people the

opportunity to unearth their being – their reason for existence and the role it will play in their lives. This is illustrated by the following responses:

- MJ: "I wanted to find myself; I wanted to be an example for the community where I came from. I did not want to be like other young people, who blames there background for not achieving anything, ... make these choices and you have to live with the consequences... be a better person"
- LS: "Lots of people say that I have changed, well I maybe I have, maybe I am not the person they are use too. Is that so wrong?"

It is truly remarkable to have an experience as enriching as this, and to have the opportunity to go on the road of discovery.

5.3.2.5 *Selflessness/altruism*

The following response implies the selflessness implied: "I've made the conscious decision to live my life as best as I can here, for the sake of my children" (AE). As most individuals took the decision for personal gain (career advancement, financial freedom, spiritual experience, travel opportunities, cultural experiences), a few made decisions based on their sense of responsibility towards their families. A comment such as: "I've made the conscious decision to live my life as best as I can here, for the sake of my children" (AE) illustrates the reason why they made this decision.

One of the respondents made the decision initially to protect her child: "Security, ... I decided to return" (SM). She made the decision to shorten her experience afterwards, again for her child's sake, as it would have been to the advantage of her child. The initial decision to go overseas appeared to be fruitful, but once she was abroad, she felt that raising her child overseas would be detrimental to his values and belief system: "...5 years and my son growing up in a foreign country with different values and beliefs, I decided to return" (SM).

The reasons to relocate for one of the respondents were her "fear of the future for my children" (CC) and "to shelter my children". Another individual commented that it was better to go and seek opportunities elsewhere - opportunities in a country that did not discriminate, a country which could offer

"equal opportunities for my children" (KM). This respondent was not only interested in her progress and a good life, but she was considering her children and their future when she made this decision.

Another respondent commented that she did it for her fiancé, sacrificing her valuable time with close family to do it for him: "My husband (fiancé at the time) always mentioned to me that he would love to go and explore the world. ... I must say, I was not too keen at first, ...that is the time I realised, that I am not going for myself, but because he asked me to support his decision" (MJ). One of the individuals stated that relocation would offer "better opportunities for myself and my child (SR)", again indicating that the decision was not only to advance herself, but also to provide a better opportunity for her child. The great sense of responsibility of one's family came strongly to the fore with various expressions made by individuals, for example: "I had to be strong for everyone" (CC).

Part of this altruistic act could be attributed to the inherent need of a mother to protect, to nurture, to guide, to care and to provide for her child or children. It could also be viewed in another context as doing it in the name of love. This act of selflessness is one of those typical traits mothers would naturally want to demonstrate. Mothers, except for one respondent who did it for the sake of her relationship and her fiancé, expressed all the above statements. It was very different to how fathers reported on their roles and reasons for relocation, as it was mostly because of their career, financial reasons and other exploration and travel opportunities.

5.3.3 Travel (exploration) opportunities

It seems as if people take this opportunity to go overseas, because they normally love to travel and get pleasure from experiencing the world/other people/places/cultures (KM: "My family has been able to see another country something they would never have done if we had not moved"). This type of individual is different and values travel opportunities in every sense of the word. The respondents illustrated their love for travelling as follows:

- JD: "Although one can travel the world from SA, it's much cheaper from the UK."
- VGA: "... greater ... travel opportunities."
- HW: "...also got to travel a lot more ... than I did with my previous employer. And that was how I saw more of the country. I got to see many more of the big cities. I was in Brisbane thrice."
- KM: "My family has been able to see another country something they would never have done if we had not moved."
- JL: "...this country (US) affords us opportunity to experience new things culturally and geographically."
- IS: "Also to travel from the UK is much cheaper because even though the cost of living is supposed to be high over here, you are still able to travel or should I say you can afford to travel. For the family (my family) to go to Switzerland for a couple of days, for the whole family return it would only cost us £200 but for us to go on holiday to South Africa would cost us over £2000".
- BL: "Being in the heart of Europe means that you can visit different countries for much cheaper."
- WP: "...created opportunities to travel."
- LS: "...definitely travel, travelling was so cheap. I could go for a weekend to a different country if I like. The lifestyle is just so easy and affordable there."

These statements give an indication of how individuals made use of the opportunity to travel the world during their expatriation experience, as well as an opportunity for some of these to travel and explore as a family as stated by IS, JL and KM.

5.3.4 Financial freedom

The traditional role of men was to provide, especially, financially (CC: "...and are attracted to earning a lot of money overseas"). Individuals can view having and wanting money differently. On the one hand some view it as being underpinned by high materialistic principles. On the other hand, it can be viewed as a drive, a discipline, a financial plan and the desire to increase ones economic status, as some of these individuals stated (VVP: "...financial reward"; ET: "Financial gain"; LS: "the money"). Given the weak Rand, and the many career opportunities available abroad for individuals, it seems natural that certain people would grasp the opportunity of earning much more money than what they ever could expect in South Africa. Many of the respondents indicated this notion:

- JD: "Money/financial stability"
 "...build up some savings/investments"
- VGA: "... greater earning potential"
- CC: "...and are attracted to earning a lot of money overseas"
- IS: "to save enough to take back to SA to be used to pay off a mortgage"
- BL: "Better salaries – this is myth because once you earn in \$ and spend in \$ then "better" becomes a relative term"
- KM: "We do not have clothing accounts because everything can be bought cash it is affordable"

The financial freedom, or even the fantasy of such freedom, was certainly attainable for a few individuals. As part of their personal goals, financial freedom was an element, which came out strongly. It would appear that being financially independent or self-sufficient was high on the priority list of some individuals. It was interesting to note that financial freedom was equally important for men and women, indicating that these individuals weighed up this category evenly. In the past, money was seen to be in the hands of males, and the notion of being the provider ultimately rested on the shoulders of the men, but as can be seen by the responses, this no longer appears to be the case. The ability to earn, as well as the dream of being free of a financial burden, was clearly a popular consideration.

5.3.5 Spiritual experience/meaningful life

To live a meaningful life means to live with purpose, to live a significant life, to live with eloquence, to live with a plan (SM) "Man was not created to function as an island, therefore if we see a need and can see the solution...one should offer and work to do it"). All these descriptions give the impression that it is not always attainable. In this study, there was no distinction made between religiosity and spirituality; in fact, religiosity was a theme within the broader category of spirituality. One individual commented on the importance of going to church, and serving a God and feeling that no-one is criticising her:

LS: "Church, well there is a lot of opinions about the church. To me religion it's something that is between you and God and many people disagree. I was in the Hillsongs church ...that is a church that is full every Sunday 3-4 times a day with about say a 1500 people each ceremony. I can go there and no one will judge me for what I wear, what I look like I was just one of the many people that came there to get a message and praise the Lord in a way that suits me."

Whilst the debate in academia continues on whether religiosity and spirituality can be used interchangeably, the researcher used the broader theme of spirituality, and used religiosity as a sub-theme. More than 50% of the respondents noted the importance of living consciously and experiencing a worthwhile life. These experiences were echoed in the following statements:

AE: "You are ultimately the only one in charge of how things work out for you in the end. I've made the conscious decision to live my life as best as I can ..."

SM "...but for the rest it was an experience well worth while."

The description by one individual of her views on life, and how one should live life, was profoundly stated in the following words: "Man was not created to function as an island, therefore if we see a need and can see the solution...one should offer and work to do it" (SM).

Individuals felt an urge to contribute to a greater cause, whether it was to the community, the family and friends or to God. The children of some of the expatriates could also benefit from the experience, and these benefits seem to be life changing (JL: "... adapted very easily, even my daughter who was very much an introvert. She has grown in maturity and confidence, in leaps and bounds. My son was a bit depressed initially but once he made friends and joined a soccer team, he has been very positive").

These benefits brought about maturity, independence, self-reliance, self-confidence and life skills that will be beneficial forever. The experience of expatriation did not only have advantages in the financial, career and travel spheres, but also in other spheres, as expressed by one respondent: "You grow literally in every possible aspect of your life ... spiritually ... you name it!" (BL). This experience had therefore an advantage of spiritual growth, which was

much deeper than the growth in one's career or elsewhere. As part of the spiritual experience, a subcategory 'religiosity' emerged, as articulated by some individuals:

- HW: "I belonged to the United Church. It was called United because it was a combination of Methodist, Congregational and Presbyterian. I enjoyed it up until the ministers made it more like a political rally than a church sermon. I also visited the Catholic Church there as I had a few Philippino friends, same as ours except with less burning of incense. Knowing God was always there for me and kept me from being lonely even though I was alone."
- "I believe in the higher Power, that He knows what He's doing and that sending me over there was the right thing for me at that point in my life."
- CC: "... and trusted that God would take care of us."
- JL: "We are not as involved in the community as we would like but do attend church and look for all opportunities to engage with others."

Another respondent noted that once you have made this decision, there are certain sacrifices one will have to make and beliefs that will be challenged: "some environments no church, ...Saudi" (ET). This will truly be a struggle for some individuals who are very religious and need this part of their being to prosper and feel fulfilled. Another respondent was confronted with serious questions on life – questions regarding her existence and purpose:

- MJ: "You have to learn out of every choice you make. It is sometimes very difficult... When you are far away from home. Wishing, and asking you why I came over here. What am I doing here? What do I want to learn here?"

One of the most powerful statements made was: "We have a life not an existence" (KM). To exist merely is to stay alive, but for no purpose, for no reason, for no significance, for no impact, but the opposite is true when one is living purposefully, the live a life of meaning.

5.3.6 Family and friends support/non-support

The role played by family and friends appeared to be noteworthy.

HW: "I came back because my family was here, because I was tired of missing birthdays, anniversaries, weddings. I felt like I wanted it all. The perfect job, which I had, but also my family closer. No one should have to be without their families forever."

In the academic literature, the well-being of the spouse and children of the expatriate were closely linked to the expatriate's success and effectiveness. Family problems were cited most often as the reason for despondency or the failure to complete an assignment. Two contrasting viewpoints were expressed when individuals reported on their social network, in particular, close family and friends. The one viewpoint had a strong yearning and possibly reliance on the support of family and friends, as this was their extended social network, i.e. (infrastructure). The heavy reliance on the support of friends made this experience less demanding and more enjoyable according to the following statements:

SM: " I had friends living and working in a hotel and they made it possible to fly across and walk right into a job with accommodation and pay"

"I know that relocating brings many obstacles ... and friends, things can be dealt with better."

GN: "Friends and family Generally very supportive though."

VGA: "I had friends who I could lean on and that is helpful to get up to speed quickly on simple everyday things. For the rest don't be afraid to ask questions and to look stupid – you don't know so ask!"

" ...for which both friends and family helped."

JL: "Family got great support from fellow South Africans who had arrived before us – this helped a lot."

"Very positive response from family and friends. Most colleagues were very happy for me."

IS: "It did not have an impact on my family life as they fully supported me (brothers etc., ...got 80% support.)"

BL: "I got a lot of support from my immediate family – not too sure what I would have done without it. When you move overseas, it does not only change your life but it changes the life of all of those around you."

5.3.6.1 No support from family and friends

A very small number (only 14%) commented on the fact that they had no support, meaning they had no expectation or reliance on their family. These

sentiments were made clear in statements such as: "We did not have much support from family if any" (KM); "None" (SR). This divulges that there is usually a greater reliance on family support and it is possibly linked to good family relationships and strong family ties. The question about positive family relationships has not been explored; this is a mere deduction from the broader context and the style in which the respondents answered the question(s).

5.3.6.2 Missing of friends and family

The weight family relationships carried was an undisputed fact and is illustrated by statements such as:

- HW: "The decision to go ... not an easy one for me to make. I had to discuss it with my family"
"...it comes to family ties, mine didn't seem to get any weaker. I'd actually go so far as to say my mom and I got closer. We obviously didn't fight as much as we did when I was at home, called twice or thrice a week, and generally I guess they missed me as much as I missed them. I missed my friends here too but we stayed in contact all the time."
- GN: "I think this is always the toughest part for the spouse... Family values – could be a little stretched if one is used to having very close family ties and that gets stretched with the physical distance. I think with good technology (e.g. Skype / video conferencing) this impact is lessened."
"You leave behind friends and family."
- AE: "...feelings starting to creep in of missing friends and family."
- JD: "Support from friends and family made it easier."
"... missing out on quality time with family and friends."

Another individual (in her twenties) really missed her family, and the special events they celebrated as a family:

- HW: "I came back because my family was here, because I was tired of missing birthdays, anniversaries, weddings. I felt like I wanted it all. The perfect job, which I had, but also my family closer. No one should have to be without their families forever."

Other individuals felt sad because their children did not have an opportunity to build relationships with the broader family (grandparents, cousins, uncles and aunts):

- KM: "The only regret is that my kids grow apart from the rest of the family."

- IS: "...except after 8 yrs they have gotten older as they both in their 70's and their grandchild is missing out on getting to know them."
- SJ: "...did not believe at first that I would make the move as I am very attached to my parents."
"...my mother became very sick and I understand now why I had to come back."

All these statements speak true of the value these individuals place on a relationship with family and friends.

Various individuals confessed that while there is an opportunity to see their family, the distance does not make it easy, as it cannot happen as regularly as they would want thus leaving them to feel somewhat empty.

- WP: "It distanced the people in South Africa only because we only see them once a year"... It is difficult to leave family and friend behind..."
- DTM: "Missing family but remain in regular contact."
- LS: "Missing the parents and the family, especially Sundays were the worst because that was the day we normally ate a nice Sunday roast at home together as a family. Then you start to realise that you can't just get in your car and go home for the weekend. It is special things that you miss, things that you and your parents did together."
- JL: "At times she misses family but it soon passes."
"...What we miss the most is family and friends."

Their responses indicate that the entire experience was challenged by the fact that they missed these acquaintances. Family added value in their lives and give them a sense of belonging. These individuals did not experience this valuable facet of life.

5.3.7 Alienation - the unknown

It truly takes a special person to dare the unknown. The decision to challenge the unfamiliar and venture into the unknown is unusual, as the nature of human beings is to operate within known boundaries and they prefer to remain safe (AE: "You start to wonder if you are an outcast and whether you will ever fit in").

This was a strong theme that emerged from the responses. The mere fact that these individuals took the bold step to tread in unfamiliar territory, says

something about their character. This kind of character could be described as brave, daring, courageous, strong-willed, spirited, gutsy, intrepid, valiant and determined as deduced from the following statements:

- AE: "You have to put yourself out there to make new friends" ; "They have their own 'lingo' and you do not know what it means. You start to wonder if you are an outcast and whether you will ever fit in."
- SM: "...as it is a huge jump if one is not prepared properly."
- BL: "Language for sure one of the biggest obstacles, it is very intimidating when you arrive in a foreign country and cannot read/understand a single word – so from doing grocery shopping to getting a mere taxi can become quite an ordeal, Cultural difference. Understanding the local currency and local prices – do not try to convert to Rands – you will literally go hungry because a sandwich plus a drink in a foreign country can easily cost you R150 if you convert whilst the same goods can cost you R50 locally – so you have to put spending into context. Making new friends: my experience tells me that Europeans are not as open and receptive as South Africans. It can take you up to 12 months before you make good friends. This is quite shocking because for some reason you expect everyone to embrace you when you arrive." "You grow in leaps and bounds because you are completely out of your comfort zone."

All these responses clearly illustrate the kind of "gutiness" in the individuals who have engaged in the expatriation experience.

The unknown brings many challenges, some of which you never could have been prepared for, and was indicated by statements like:

- VGA: "In SA you know when things are expensive or cheap and you can plan accordingly, going overseas that net is withdrawn and you have to re-learn all the issues around budgeting and what things cost." "Certain things you sacrifice willingly, others you sacrifice without knowing they are sacrifices."

To immerse oneself in unfamiliar territory is indicative of an individual that is strong-willed and determined. These qualities were illustrated in expressions such as:

- VGA: "Not knowing whether the salary I was going to earn was good or not and what kind of lifestyle it would afford me."

CC: "...not knowing if you would get work on the other side, not knowing what it was going to be like; ... consoling children who were afraid and did not wish to leave everything that they knew and loved."

There were also the expected frustrations and limitations:

- GN: "...move across and have to rent a fully furnished apartment – means that you leave behind your comforts – once again, it may detract from settling in quickly ."
 "The little things take some time getting adjusted to – difficult to buy anything on credit since one has no credit rating."
 "Different work environment with different challenges, a whole new place to explore."
- HW: "... So besides missing the beach..."
- KM: "Getting used to the climate, the difference in the way of life as we are now in a very diverse city."
 "This was fortunate we also did not believe in maids working for us or gardeners so moving over would not have meant leaving the comfortable life behind."
- SR: "Having no history and finding a place to stay, opening bank accounts."
- JL: "... issues we had to work through - so not all rosy, i.e. took a while for son to adapt to education system here; finding a home and furnishing of the home, banking system and access to credit as non-resident was a challenge, utility and medical costs are expensive here."
- MJ: "This was the first time in my life I ever left home, ever gone so far and the first time I set my foot on a plane, ...everyone looked at me differently, almost as if you are coming to take over his or her country. Just there and then, I realised that I am not in South Africa. I should learn to be like them. I should be unfriendly, act irritable and just be sad. Was I able to do that?"
- WP: "It is natural that one will miss all the known elements of your social framework."
- LS: "...everything is new..."
- AE: "Things that people here would take for granted like what time the pharmacy closes, where would you look for bargains, what is the best doctor to go to. You have to 'learn' so many things from scratch."

Some of the respondents were deliberate in their experience of the unknown – deliberate in the sense that they did not want the known, they did not search for the known, and they did not long for the known, as they prepared themselves psychologically.

LE: "Once you arrive in the new country, do not create a 'little South Africa'. Many migrants start looking only for South Africans to be their friends. Others start looking for rooibos tea, Mrs. Ball's chutney and smarties to remind them of home- then why did you leave in the first place"

The psychological preparation played a huge part in the total experience and the overall positive or negative perception of the experience. The premeditated decision to search for the unknown can be illustrated by this statement:

VGA: "One of my enduring frustrations with immigrants is that they try to hang on to what they are comfortable with, so they tend to congregate together and seek each other out. They congregate in the same bars, pubs and look to where they can buy home foods and stick to the same brands of beer and wine."

There was a sense that the individuals who prepared themselves for the unknown, and the individuals who did not seek the known, were the ones that experienced this more positively.

5.3.8 Openness to experiences/embracing change

A prevailing theme emerged regarding the ability to rise to the challenge of the unknown, and make it work. These kinds of people are described as innovative and creative, and these are the people who often face insurmountable odds. Such people do not take advice easily, and even when friends and family caution or point out the hazards and dangers of precipitous actions, they will still continue, will not take "no" for an answer and they will persevere in spite of the odds. They have the Promethean qualities of courage and dynamism; they are willing to take chances. Promethean personalities have a passionate, volcanic desire to achieve and they are much more than your average risk-taker; they are rather an adventurer. Such a person can live with uncertainty and unpredictability. "According to William James, it is only by risking our persons that we live at all. Often enough our faith beforehand in an uncertified result is the only thing that makes the result come true. Such individuals are highly charismatic, enthusiastic, and inspirational. They exasperate, but also

motivate those around them" (Kurtz, 2000, p. 93). A few statements by certain individuals illustrate these traits:

- ET: "Adventure ...renders one more broad-minded"
- WP: "At the end of the day being an expat is a lifestyle in itself and something you need to adapt to, ...However one need to be open minded and adapt to the new challenges."

The typical characteristics associated with such thought processes are risk taking, openness to new experiences, embracing change, optimism and hope.

- AE: "You can basically end up being miserable and go back to South Africa, or, you can be open to change and take new things on as they come."
- SM: "I love change, so everything was fairly easy".

This clearly illustrates the willingness to dare the unknown and a liberated vision. Once you believe that the experience will be easy, it will most certainly be the reality. One's desire for adventure and a pioneering spirit will undoubtedly make the experience more manageable. These types of individuals can be described as self-reliant and independent. This is embodied in statements like:

- SM: "...grow-up with independence as a main character trait."
- VGA: "and then you keep your attitude open and ask lots of questions and learn and that helps a lot"; Relocation is an exciting opportunity, you put shackles on the experience if you don't allow yourself to experience the process, the people, the culture and the food."

By viewing this entire experience in a more optimistic light will undoubtedly bear fruit, as described by IS: "The experience and opportunity to live in another country is great. By limiting yourself to experience the process in all its facets, forms and shapes, could be compared to being in Italy and not having pasta." A respondent thought that the easiest way to make this process work is to be knowledgeable, because knowledge is power, which enables him to feel more in control, to feel he knows where he is going and what he wants from life. The following statement echoes this conviction:

LE: "To make the relocation as comfortable as possible; arm yourself with information about the process as well as the local area in which you are going to live, embrace the new world that you find yourself in and remember that you are still going to long for South Africa. Just be realistic."

This comment indicates that realistic preparation can be enlightening to the expatriate and the entire experience. This experience had a much deeper value and it changed various perceptions about status, about family and generally about the world. This aspect was illustrated by one individual who stated:

LE: "You see the world through different eyes; ...Because there are not such huge discrepancies between the different occupations, you tend not to define yourself in terms of your job anymore; You embrace change more easily; You realize that South Africa is only 12 hours away, so there is no reason why you cannot be part of any major event in your extended family's life".

People validate these decisions by being practical, realistic, prepared, and willing to accept that change is constant. They have the resilience and backbone to persevere.

5.3.9 Fear/safety and security/anxiety

Everyone experiences psychological stress at some point in their lives. For some people, stress is a debilitating problem that interferes with virtually every aspect of their lives (CC: "I was becoming paranoid"). Stress causes problems in particular situations for others, as can be seen in the few situations experienced by some expatriates while, on the contrary, stress helps others to accomplish important goals.

Underlying these responses are the frightening thoughts that are linked to the emotion "fear". Fear drives people insane, makes them feel anxious, not in control, pessimistic, cynical, nervous, concerned, worried and disturbed. Fear is one of those extreme emotions that are hard to manage at times. Exposure to various kinds of stressful situations (i.e. crime, rape) can cause an observable anxiety reaction. Kaplan and Saccuzzo (2001) describe anxiety as an emotional state marked by worry, apprehension, and tension. When a person is

anxious, the autonomic nervous system becomes activated and he/she experiences a faster heart rate, pulse rate and the hands tend to sweat.

The amount of anxiety each individual experienced depended on their individual and unique experiences and the intensity of the stress-producing experience, as it was perceived. For certain individuals, these situations were reaching a high level of intensity.

- AE: "You get to Cape Town, and can immediately see the difference. There's such a lot more people and law and order does not seem like a big priority to people."
- SM: "...relocated for 'security' reasons."
- CC: "Crime, future of children, Aids and fear of infection, and leaving the known behind."
"I was becoming paranoid."
"...I wish my remaining family would too, for the sake of their stress and security."
"We had prepared the children but nothing really prepares them for such a big move. They felt powerless, helpless and afraid."
- KM: "Security, safety."
"The escalating violence in S.A and the violent nature of the crimes."
"My 18 year old daughter can go out at night without been raped or mugged. My kids go to school without the fears of what might happen while them on the play ground."
- SR: "Safety and security- crime."
- LE: "...people relocate because there is elsewhere a relative low crime rate."

A few respondents shared some disappointment around job opportunities, violence and the government's modus operandi, as echoed in these statements:

- DTM: "Uncertain socio-political future of the country, discrimination against white persons in the job market and disproportionate violence (physical and emotional) against white persons."
- WP: "...and dissatisfaction with poor Governance of South Africa, high crime and a perception that RSA is sliding in to unlawful and corrupt state with no future."

Fear is as real as how you experience it, so it is understandable that people would take drastic measures for the safety and security of their families.

5.3.10 Patriotism

When South Africans sing, "my blood is green" when watching the Springboks play, this gives true meaning to patriotism. The love for their country, the need to return one day, the yearning for the sunny homeland, the longing for friends and family, differed considerably between two poles. One group, the larger group of the two had a strong yearning, and would always return, and it could be picked up in the various statements:

- IS: "I'm still a South African and always will be as we come from a very beautiful country and the lifestyle ...and could have applied for my British passport 3 yrs ago but have not."
- AE: "If you hear someone talking in Afrikaans, you want to run over to them and embrace them"
- SM: "...I decided to return"
"I love my country have learned that the grass is not greener on the other side in all respects"
- HW: "...looked just like South Africa, ...everything else was pretty much the same. All the people spoke English, ate the same food we do, said please and thank you; I was made aware that even in our country there are so many differences between our cultures, differences that still today keep us apart, but once you're in another country the fact that you're South African means we're all the same."
One South African family from Polokwane (old Pietersburg) sort of adopted me. I spent most of my time there. There were the parents, four kids. And there was Granny. She was only visiting and is back now. I had many other South African friends, another family..."
- CC: "A sense of deserting the motherland when you felt you should be staying to help"
- LE: "Although we are leaving we would like to have a 'footprint' in South Africa. If we sell the house we feel that we will loose that 'footprint'."
"...and remember that you are still going to long for South Africa."
- AE: "...and Cape Town, well, that will be my home away from home."

5.3.11 Cultural empathy/acculturation

This was a dominating theme, as 90% of the respondents commented that the experience of getting to know other people's cultures was very important and part of the excitement of these experiences (GN: "...to explore, different cultures to appreciate..."). There are various factors that ease the cultural

adaptation process, and some of these factors include personality, expectations, prior overseas experience, motivation, language skills, intra- and intercultural relationships, preparation and training.

The indication that prior overseas experience eases the expatriate's career assignments seems to be carrying weight, even if these experiences were merely related to tourism. These prior experiences or the love for travelling played a prominent role in the shaping of attitudes and the realistic alignment of expectations to actual lived circumstances. These experiences had various benefits in that it created awareness and imparted knowledge about non-verbal and cultural cues, as well as a heightened sensitivity to cross-cultural issues, a greater tolerance for differences and a greater flexibility and openness to new experiences. As many of the individuals indicated their love to travel, they also mention the challenge of cultural adaptation:

- AE: "One of the first things you see is that there's a lot of different cultures that have flocked..."
"They have their own 'lingo' and you do not know what it means."
- SM: "...and people are more accommodating if you are foreign"
- JD: "Working with the different nationalities"
- GN: "...to explore, different cultures ... to appreciate..."
- JL: "As a family, we have a few friends and many "superficial" relationships with people. Americans are very polite /courteous but not easy to build strong relationships with."

The importance of understanding basic language was highlighted by expressions such as: "Language is for sure one of the biggest obstacles, it is very intimidating when you arrive in a foreign country and cannot read/understand a single word – so from doing grocery shopping to getting a mere taxi can become quite an ordeal" (BL). Having basic language skills, allows them to use public transportation and shop, which makes it possible to participate more fully in daily life. Complete lack of language skills severely limits the options and personal freedom of expatriates. For those who at least learned the most basic expressions, which allows them to engage in the daily tasks of living and of using routine services, it appeared that they were more capable of adapting successfully.

Cultural adaptation is seen as one of the greatest challenges when relocating, as the following statements suggest:

- GN: "It takes some time to get accustomed to the change in cultures and to make new friends – I think this is always the toughest part for the spouse."
- VGA: "...new cultures..."
"Relocation is an exciting opportunity...you put shackles on the experience if you don't allow yourself to experience ... the culture..."
- CC: "Adapting to a new culture and finding a new home."
- LE: "To understand the 'lay of the land'. By this it includes getting familiar with the local community, understanding the cultural aspects of the new country."
- SR: "Being integrated into local (Australian) networks; getting used to the work culture and ethics."
- JL: "...this country (US) affords us opportunity to experience new things culturally ..."
- IS: "The social network back home is totally different to living in the UK. The Brits seem to socialise more in the pub than in their homes like South Africans tend to do. You cannot just go round and visit, as you have to wait until you have been invited. Back home people are more laid back and know how to relax more. We have been living in our neighbourhood for 5 years now and invited the neighbours to come braai with us but it never happens."
- BL: "You grow literally in every possible aspect of your life: ... culturally ... you name it!"
- KM: "They ... know a lot about other countries, their beliefs and cultures..."

The experience allowed people to interact with various cultures and it made them more open-minded. This was asserted as follows:

- ET: "...other opinions, cultures, ideas better received; new cultures evolve."
- MJ: "This was also a good time to socialize, most importantly to get to know and learn of all the other cultures. I met people from India, Poland, Germany, Sweden, Italy, Pakistan, Spain, Russia, America, Barbados, Brazil and do not forget London and of course South Africans."
- WP: "...interact with other cultures"
- LS: "Experiencing different cultures"

There seems to be a degree of flexibility, openness, willingness to find the new and embrace it, to make this experience truly successful.

5.3.12 Additional themes

These themes are almost unique, as some of these experiences have not been felt by others, but the researcher it important for the purposes of the study. As it was important to the individual respondent, it would be more complete to include these experiences.

Redundant (unwanted) feeling: One of the respondents expressed her feelings around the current situation in South Africa and her experience of feeling unwanted by stating: "...a feeling of not been wanted anymore" (CC). Another respondent felt doomed to failure in South Africa when she stated: "If the government cannot offer their people a better life then why should people stay in a country with little hope" (KM). Another respondent felt that he did not really belong in South Africa: "Us, as white South Africans and more specific Afrikaners, seem to have a nomadic element in our makeup and in a way are without a real home. People from other nations do not look at us as "Africans" they see us as Europeans living in South Africa" (WP). These were sentiments from a smaller group of individuals, but still valid and worrisome in the broader South African context and considering the responsibility of this government in providing opportunities for its citizens.

Awareness about difference and similarities as South Africans: In this particular observation, some South Africans left because they felt that South Africa did not give them enough opportunities due to affirmative action policies: "...discrimination against white persons in the job market" (DTM). Other expatriates felt that once they have been to another country, race begot a different meaning for them; they became less occupied with it and had good relationships with South Africans of all race groups, unlike when they were in South Africa. The contrasting views were expressed as follows:

- CC: "Some conservatives refuse to stay in a country where there is a black government as they consider themselves to still be the 'chosen race'."
- KM: "...and equal opportunities for their children in a country that does not see colour or race"

Other individuals had the opposite experience about race in South Africa versus elsewhere:

- HW: "I was made aware that even in our country there are so many differences between our cultures, differences that still today keep us apart, but once you're in another country the fact that you're South African means we're all the same."
- KM: "You loose or become less preoccupied with race."

It should be safe to say that, given the South African context, apartheid played a role in the decision of certain respondents and certainly influenced career opportunities in one way or the other.

Emotional adjustment: Psychological adjustment is an extremely big part of making this experience successful. Whilst a limited number of expatriates commented on it, it is considered important and can be highlighted by statements such as:

- KM: "Nothing can really prepare one for the emotional adjustment."
- SM: "I also think that the emotional part of relocating should be delved into a bit more, as it is a huge jump if one is not prepared properly."
- BL: "The downfall is that you are NOT well prepared emotionally on what to expect and this can be the real shocker."
"You grow literally in every possible aspect of your life: ... emotionally ... you name it!"

These statements indicate that there is a need for more time and effort to be put into emotional preparation. Such preparation could be the responsibility of the organisation in some and the individual in other instances. The circumstances of the relocation and broader context would dictate this.

Honesty about how hard it is to relocate: Whilst this was only mentioned by one respondent, it is worth noting and maybe one needs to explore it further: "Maybe ex South Africans living in Australia need to be more honest about the way things are and not hold back on some facts" (KM).

Organisational support: A small number of individuals were sent by their organisations to these expatriate assignments. Throughout these responses, the general sense that organisations support their employees in every possible way

came strongly to the fore. These might be isolated cases when you start comparing how many global companies there are, but it is certainly worth mentioning as it contributes immensely to the entire experience and overall success of the assignment. Individuals commented as follows:

- BL: "My company is excellent in providing relocation support, from a housing, schooling, finding a bank, getting a car, all paperwork, etc – you literally have people who wait on you when you arrive –this is cool!"
- GN: "My company does a lot to help (e.g. help with work permits, moving etc)."
- JL: "I am enjoying the work environment. Colleagues have been very welcoming and don't get a sense I get treated differently as an expat – I have heard that this often happens. We have been well supported by the company and work colleagues."

The above experiences of expatriates suggest that organisations are doing much in terms of rendering support.

5.4 GENERAL OBSERVATION AND PERCEPTIONS

The individuals who partook in this study had differing perceptions of the same experience. This is probably no surprise as it highlights the uniqueness of the human being. People made this decision for different reasons, dictated by many internal (i.e. personal goals, motivation, ambition, disappointments) and external factors (political climate, limited job opportunities, travel opportunities, economic reasons). As it was stated by one of the respondents: "...for me, career was the driver" (VGA). Some people had the perfect jobs but not their families with them, as stated by HW.

The writing style and choice of words used when answering the question(s) was very different from respondent to respondent. The researcher sensed that the key question asked was challenging to answer. Some of the individuals commented by saying that it was a very broad, open-ended question, whilst others preferred the semi-structured approach. There were a limited number of individuals who expressed strong pessimistic feelings throughout their responses.

On the contrary, most of the individuals described their experiences as positive, life changing and certainly an experience they will dare to do all over again.

CHAPTER 6

VALIDATING EXPATRIATE EXPERIENCES WITH EXISTING THEORY

6.1 BACKGROUND

This main aim of the study was to gain an understanding of the shared experiences of the phenomenon called expatriation, through an in-depth interview process. The investigation involved semi-structured interviews with twenty individuals, who have had this experience or are currently experiencing expatriation. A methodical process was followed to analyse the raw data. Firstly, the data was coded and thereafter categories were identified which emphasised common themes, as well as dissimilarities. Through this analysis, the expectation was that organisations, as well as individuals undertaking this journey, would benefit from these unique experiences of others who were willing to share them with us. The benefit would be that the person and the organisation could achieve a state of "good health". The dictionary definition of health is "the condition of being sound in body, mind or spirit, especially the freedom from physical disease or pain; and in addition, a flourishing condition" (Merriam-Webster Dictionary, 1997). The World Health Organisation (WHO) defines health as a state of total physical, psychological and social well-being and not merely the absence of disease or ill-health (WHO, 1948). Health therefore seems to encompass flourishing and well-being. Larson (1999) notes four schools of thought regarding the conceptualisation of health, namely:

- The medical model (focus is primarily on the absence of disease);
- The WHO model (state of complete physical, mental and social well-being);
- The wellness model (focus on the strength and ability to overcome illness, optimism about the future and potential);
- The environmental model (emphasises the individual's adaptation to his/her environment, including physical, social and other environments).

Parsons (1968) defines health as a condition of optimum capacity of the individual. This state enables the individual to effectively perform the various roles, responsibilities and tasks for which the individual has been socialised.

Preference is given to the focus of models three and four, and the researcher can strongly associate with the definition of model four (Hoffman & Tetrck, 2003).

Expatriation was defined by various authors, and for the purposes of this study, the Wikipedia definition of expatriation was chosen. An expatriate can also be defined as an individual who temporarily or permanently relocates to another country and culture different from that of the individual's upbringing and/or legal residence. The origin of the word comes from the Latin word ex, meaning out of, and *patria*, meaning country (Retrieved 18 January 2008 from <http://en.wikipedia.org/wiki/expatriate>). The phenomenon itself was described in many contexts, including the South African environment. From an organisational perspective, various advantages and disadvantages were highlighted, as it is important for organisations to be productive and at the same time, take responsibility for the career development of their employees. The balance between family responsibilities and career demands were discussed. The academic literature illuminated the fact that family and work roles are inevitably intertwined.

The challenge for the individual is around the potential cost of career success versus quality time with family. Whilst family demands are strong on the one hand, the dual-career couple faces challenges in the expatriation milieu. The discussion around the advantages and disadvantages for individuals, as well as for organisations was discussed. It was evident that organisations need to be proactive in their contribution to managing dual-career couples experiencing expatriation. The academic literature was as elaborate and expressive in identifying that organisations need to utilise certain human resources strategies to account for this problem. Family support and organisational support were issues identified that play a major role in the ultimate success of the expatriation experience.

The career psychology discipline is the foundation of this study, and the notion that human beings have an urge to keep on developing and experience self-actualisation has been a central assumption throughout this study. Self-actualisation involves a self-enriching inclination through psychological growth. Furthermore, it is described as an experience by seeing meaning in being (Rogers, 1978). There is certainly a strong argument that this experience will only be for certain people, whether natural or otherwise, and that the individuals in this 'play' possess various skills and abilities to make it successful.

The traditional career path and career development model predispose certain phases in career development of individuals, which is largely coupled to age. The expatriate phenomenon challenges the traditional career development models and structures. Stead and Watson (2006) identified "the chaos model" which is at odds with traditional career management models. This chaos theoretical approach is to accept that career development can move on a development curve and individuals can be creative in realigning their career. The expatriate phenomenon can be characterised by the protean career. This type of career is driven by the individual rather than the organisation; it is the type of career that calls for frequent transformation and innovation; and it is propelled by psychological success more so than by organisational performance measures.

Most individuals interviewed have all had a direct hand in how their career took shape. They were intentional in the decision around an international career and have all challenged the traditional literature around career development. Unearthing these experiences lays a foundation for organisations to adjust career management and development policies and related strategies on the one hand, and for individuals on the other hand, to take the proverbial step into the unknown (to find purpose and meaning). This study does not claim that one needs to experience expatriation to find purpose and meaning, but it acknowledges the prevailing sentiments shared by individuals. An evident theme was the search for a more meaningful life.

Key categories emerged from the interviews, and contributed to the overall positive experiences by individuals. The most dominant categories will be extracted for validation by means of existing literature.

- Career opportunities (psychological career success)
- Positive attitude/frame-of-mind
- Travel opportunities
- Financial freedom
- Spirituality
- Family and friends' support/non-support
- Openness to experiences/embracing change
- Patriotism
- Cultural empathy/acculturation

6.2. METHODOLOGICAL ORIENTATION

Polkinghorne (1991) states that a phenomenological study focuses on the meaning of the experiences and it could be described as the exploration of structures of consciousness in human experiences. Twenty individuals shared their experiences of expatriation; each individual had unique experiences dependent on various environmental factors, including but not limited to age, gender, family orientation, country, organisation, politics and economics. By emphasising the meaning and drawing specific meaning units, various categories evolved. The application of an inductive method (grounded theory) was used to extrapolate meaning and transfer the meaning into theory. Grounded theory is particularly useful when the depth of an experience and the full meaning needs to be uncovered. The theory evolves from the data, hence the need for comparing raw data with existing research, as well as ensuring trustworthiness.

6.2.1 Career opportunities (psychological career success)

The individuals who had been experiencing this phenomenon have been in different career stages, starting from the early career stage (early twenties) to their mid to late forties. They were all in various stages in their careers. Some were fairly settled and yet prepared to seek beyond the current career boundaries.

Whilst some of the literature guides us in these stages, it is imperative that one considers the South African environment and contextualises these experiences accordingly. Stead and Watson (2006) state that career opportunities in South Africa were influenced by the apartheid regime prior to and post 1994, affirmative action measures and the Employment Equity Act, Act 55 of 1998.

Greenhaus et al. (2000) indicated that the pursuit for meaningful and challenging work has been important for individuals, but so was a satisfying personal life. The pursuit of 'career success' has the potential cost of less time or energy for family, recreation and self-development. Despite these trade-offs, individuals were still prepared to sacrifice some elements in the name of their career and the opportunities available. As for the organisation, Hofstede (1991) maintains that organisations sending employees abroad have yet to understand those factors which facilitate adjustment to host countries and host cultures. Furthermore, the author noted main reasons for unsuccessful expatriation, including the inability of the expatriate or the broader family to adjust to a local environment; immaturity of the manager; incompetence and the inability to handle increased responsibility; and incomplete career planning. Whilst these reasons are all legitimate and valid, none of the individuals interviewed were nonchalant about their career planning. In fact, the opposite was true as they were conscious of their careers and the decisions they made, which influenced their careers.

Research conducted by Bennett, Aston and Colquhoun (2000) found that expatriate failures that are less visible, but often more damaging, are lost self-esteem and the negative impact on their careers. Whilst a limited number of individuals were on corporate relocations (sent by their organisations), these

are well-founded concerns and one is tempted to argue that because of these invisible costs, expatriates' decisions regarding their careers are premeditated.

Varner and Palmer (2002) contend that clear goals and objectives in each stage of expatriation, could possibly guarantee a more successful expatriation process. In an organisational context, they state that when an expatriate contributes to the organisation's progress and advancement, the experience can be claimed successful. An organisation's work does not end at the support of the expatriate, but the importance of repatriation could also be viewed as a measure of success. Barbian (2001) argues that the human resources policies, in particular, the quality of a company's expatriation policy, are a direct measurement of the successful repatriation process. Linking this to the career of an expatriate, organisations have a lot of work to do to ensure success in this arena.

Lips-Wiersma (2002) found that individuals, who believe in the importance of the purpose of developing and finding themselves through personal growth and self-knowledge, make conscious decisions in relation to their work. Furthermore, individuals continuously assess whether their work presents opportunities for personal growth and development. As many individuals stated, they selected this experience because of the limited career opportunities (CC: "... limited career advancement"; BL: "Better career prospects, international exposure").

The academic literature on career management has addressed the concept of a career as a calling, and is primarily concerned with the meaning of self-realisation (Krau, 1997). The meaning derived from the contribution one's work is making to the lives of others, is also important.

According to Battista and Almond (1973), this commitment to meaningful living, provides individuals with a framework from which life events can be interpreted in some coherent fashion, and from which a set of specified purposes can be formulated in the context of their career. This echoes the writing of Moore (1992), stating that all work is a vocation, a calling from a

place that is the source of meaning and identity, the roots of which lies beyond human intention and interpretation.

Butts (1999) found that work represents other values, priorities and skills in peoples' lives related to the meaning people seek in work. It is closely related to the emphasis on the protean career and the internal (subjective) career experiences of individuals. According to Butts, this meaning people want in work can be linked to spirituality, which refers to a set of whole-system, time-honoured, life-affirming and unifying values which enable the human spirit to grow and flourish.

Csikszentmihalyi (1990) postulates that well articulated goals, total engagement in work activities, transcendence of ego boundaries and merging with the environment, high levels of motivation, self-confidence, ethics, competence, enjoyment, and other intrinsic rewards characterise the work and life experiences of individuals who value spirituality as the core to their choice and reason for working. These views are echoed in these statements: "changing my career" (JD); "you grow literally in every possible aspect of your life - ... professional ... you name it!" (BL).

As 90% of the individuals interviewed were in their mid- to late forties, some had undergone reappraisal of their career, and early adulthood, as well as the reaffirmation of the dream career and/or the modification of the dream career. This was not true for all individuals; many other factors played a role in their decision. The general sense of this decision for the enhancement of their careers were experienced as positive, enriching and a personal goal. Schreuder and Coetzee (2006) found that the spiritual meaning of the work is connected to the process of searching and living one's life purpose. Work is central to this, and an individual's career path is viewed very broadly. This view includes the individual (an opportunity for self-expression, optimal development) and the contribution to the good of the group and the organisation. It is even viewed beyond the organisation, to include contributions to society at large, as well as to the globe. They argue that through living an authentic life, it is possible to experience psychological career

success. It should be safe to say that these individuals experience psychological career success.

The significance of having a career and adding value in the form of work has been important for some of the respondents. Some of the respondents were deliberate in their choice of this experience, as they wanted international career experience (VGA, BL, BM, LE). Some of these respondents were motivated both intrinsically (because they were passionate about what they do, no matter the sacrifices, consequences, unknown challenges) and extrinsically (did it for the money). There was a clear message throughout the interviews that individuals would go beyond normal boundaries, when it came to their careers, to find that sense of meaning in their work. They will challenge the ordinary, they will face the unfamiliar, they will find that meaning if they are prepared to dare the indefinite. Some individuals clearly indicated a personal development plan and a career path that they intended to fulfil, despite all the odds, obstacles, challenges and, at times, no support from their personal and social network.

There was no mention in any of these interviews of the fear of failure, which again is a demonstration of their determination, an element of conquering this exigent experience, the willpower to think positively and make it work. The capacity to work weighs heavily in life roles (similar to reproduction) and is reckoned to be one of the most significant developmental milestones in the transition to adulthood.

The literature is consistent with the sentiments shared by these individuals when they contend that they will challenge all boundaries to find meaning in work and are determined to be successful in their careers. Career success is, in this framework, finding purpose and meaning in work, despite the challenges.

6.2.2 Ambition/achievement-orientated

According to Lowman (1993), E.A. Locke and others conducted research and revealed that by setting goals and objectives, individuals are said to be more motivated and they produce improved performance. The goal-setting theory proposes that specific, difficult goals motivate individuals, and that high-achievement individuals consistently engage in goal setting. From the responses received, various individuals indicated that they have set specific goals (career, financial, social responsibility) and that they are committed in achieving these goals (JD: "If you reached your initial goals there's no need to relocate"; .VGA: " In SA you know when things are expensive or cheap and you can plan accordingly"; BL:" this was always part of my career plan"). These goals generally give these individuals a sense of purpose as to why they are working to accomplish a given task. It would seem that the mere fact that these individuals had clear-cut goals, they were able to achieve them and that the goals were the main motivating factor. Bateman and Snell (2007) argue that motivation is essential to employee behaviour, such as loyalty, good citizenship and job performance at high output and high quality levels. This is the kind of behaviour that perseveres until a goal is accomplished. Some of these respondents commented on their intrinsic rewards (BL: "...personal growth"; BM: "...career growth"), whilst others mentioned extrinsic rewards ("better salary" – VGA, CC, IS, BL). It is evident from the academic literature that motivation to achieve plays a major role in the lives of people and that for certain people; intrinsic versus extrinsic rewards will be a matter of personal choice and priority.

The proposed human needs as identified by Murray (1938) include the need to conform (deference), the need for attention (exhibition) and the need to accomplish (achievement). He further describes achievement as the accomplishment of something difficult, overcoming of obstacles and attainment of high standards, to go beyond one's capabilities and to increase self-regard by exercising one's ability successfully. These kinds of sentiments were uttered by some individuals (BM: "I became disillusioned with the way medicine was practised in Africa and the lack of opportunity for further education and professional development for myself. I was also curious about working in the UK and working in a different country. Initially I only planned to

work in the UK for a year..."; MJ: "Surely, you can use that to push you to reach your goals and be a better person").

Rotter (1966) developed social learning theory in which he explains the nature of reinforcement from the social environment and how this reinforcement influences the future behaviour of individuals. He distinguishes between two individuals, one with an internal locus of control (belief that reinforcement of their behaviour is dependent on own achievements, abilities and commitment) and those with an external locus of control (belief that luck, fate and influential people are responsible for reinforcement of their behaviour). These types of individuals seem to have an internal locus of control, as expressed in some of their experiences (MJ, BM, HW).

D'Andrea (2006) found that expatriation is by far not a transient trend, but rather an increasingly common work experience, which will continue well into the third millennium. The implication of this trend has a far-reaching impact on the world of work and careers. It creates more opportunities for individuals in the world of work. The typical achievement-orientated career person will most probably make use of these opportunities as this could possibly 'still the hunger' of their sense of career achievement.

During the last decade, there was a fundamental shift in the expectations of globalising corporations. Bennet et al. (2000) proposed that expatriates need to be change agents in order to maximise return on investment in costly overseas assignments and to support the globalising process. They list a few individual and organisational competencies required for successful global competition. These include: that expatriates must have the appropriate skills, knowledge, attitude and attributes to perform effectively in a diverse environment; that expatriates and the accompanying family members must be able to personally adjust to living in new locations; and that expatriates must understand how to maximise developmental opportunities while abroad. These competencies again indicate that this type of challenge and this expatriation phenomenon would comply with the saying, "survival of the fittest". It echoes the sentiments expressed by expatriates that one needs to be broad-minded

and open for a challenge. Furthermore, Stoner, Freeman and Gilbert (1995) state that, in order to operate in a global economy, one's attitude needs to be open, one needs to be curious about the world and one needs to be willing to develop capabilities.

Hodson and Roscigno (2004, p. 672) postulated: "heightened competition has resulted in an intensified search for practices that enhance organizational success — success often defined in terms of heightened worker effort". This worker-effort could at times directly cause severe pressure, but for some workers, it is filling a 'hunger' in their beings and they will do almost whatever it takes to achieve, as reported in the previous chapter (VGA, BL, JD, SM).

In the search for maximising performance and competing globally, organisations need to adopt elements of innovative work practices. These practices include increased employee involvement, increased on-the-job training, and increased flexible work arrangements (Ichniowski, Kochan, Levine, Olson & Strauss, 1996). Some have argued that the pursuit of this strategy has improved the productivity and competitiveness of American industry (Pfeffer, 1998) and may directly benefit employees. One of the respondents (KM) mentioned that this experience allowed her to spend more time with her children, thereby reiterating the benefits of flexible work arrangements. As Derber and Schwartz (1983, p. 61) noted two decades ago, "These new [employment] systems produce new contradictions engendering worker expectations and entitlements for democracy in the workplace".

From an organisational perspective, expatriate managers receive goals that come from corporate or subordinate levels in the organisation, depending on the organisational structure. These goals are cascading to become individual performance goals that are used to describe expected actions and anticipated accomplishments by the expatriate. Expatriates who are regularly sent on these assignments by organisations have strict goals they need to achieve, which in turn can both enhance and facilitate the multinational's global strategy. These goals and subsequent performance management measures of the expatriate are derived from new organisational strategies

(Gregersen, Hite & Black, 1996). According to Geringer and Frayne (1990), organisations need expatriates to achieve these goals in order to accomplish the organisational strategy and possibly gain a competitive advantage. One could argue that due to the direct pressure on expatriates, the type of person that would be interested in these types of assignments would be the ones who are highly achievement-orientated. One could also argue that employees who psychologically engage in their work would be more suited or would be more likely to be successful.

Naudé and Rothmann (2006) define engagement as an energetic state, containing the employee's dedication to excellent performance, as well as confidence in his/her effectiveness. According to Kahn (1990), engaged employees have the ability to express themselves physically in their jobs. They are cognitively alert and connect emotionally to other employees in performing their tasks.

In reviewing the literature, there is a much stronger focus on organisational achievement and success versus individual achievement. The strong link to individual achievement orientation could be found with the goal setting theory. The relationship with theory was obvious where more engaged employees were more effective people. These types of individuals seem to be more involved, more serious about their careers and highly achievement-orientated.

6.2.3 Positive attitude/frame of mind/psychological wellness

One of the greatest challenges organisations face today in executing business strategies, is the application of motivational techniques that motivate staff and create a 'winning' attitude (Thompson, Strickland & Gamble, 2005). The million-dollar question arises – how does one achieve a winning attitude? Is it purely through motivation or could it be from an individual's stance on life? To answer this question, the academic literature is broad and varied. According to Edwards (2008), holistic psychology focuses on community and ecological interventions, spiritual healing and multi-cultural counselling. He further recommends that spiritual healing present the foundation for transformation on personal, social and cosmic level. It is the hope of the author that through

holistic psychology, there will be less emphasis on factors such as economics and politics.

Adams, Bezner and Steinhardt (1997) define psychological wellness as the general discernment experienced by individuals that there will be positive outcomes to actions or situations. This is seen as dispositional optimism, which was noticed in the responses from some individuals: (VGA, BL, GN). Yet another definition by Cowen (1994) proposes that psychological wellness is a potentially rich orienting concept that directs attention to a family of genotypically unified phenomena of interest and includes behavioural markers (i.e. having effective interpersonal relationships) and psychological markers (i.e. having a sense of belonging and purpose). Furthermore, Compton (2001) defines psychological wellness as a model containing three elements. These elements include subjective wellness, personal growth and a style of religiosity. Whilst the first two elements were evident in some responses (BL, SM), the third element is not dealt with in this category, but in the category of spirituality. It is important to note that some respondents (HW, CC, MJ, LS, AE, SM) mentioned the importance of religiosity. Benjamin and Looby (1998) defined a broader model of psychological wellness, which includes six dimensions. These interconnected dimensions include physical, emotional, mental, social, occupational and spiritual, and one will conquer optimal wellness when there is spiritual and personal balance.

One of the outstanding features of this experience was the positive comments and outlook which respondents had. Whilst a greater number of respondents testified that the experience was in general very positive, there were a few that commented on this experience in a slightly pessimistic tone (SM, HW). According to Cangemi, Chaffins, Forbes and Fuqua Jr. (1995), a positive attitude and tenacity to overcome difficulties would enable an increasing amount of women to achieve managerial success. This research was gender-specific, and most of the individuals (70%) partaking in this study were females (BL, AE, SM, MJ, BM), which confirms the academic literature.

Lounsbury, Park, Sunstrom, Williamson and Pemberton (2004) proposed a model analysing relationships between personality traits leading to career satisfaction and life satisfaction. From this research, some personality factors emerged, including extraversion, optimism, assertiveness, openness and emotional stability, and the second comprised of conscientiousness and tough-mindedness. Significant correlations were found between both personality factors and career satisfaction, between the second personality factor and life satisfaction, and between career and life satisfaction.

According to Strümpher (2004), positive emotionality is a trait when compared with positive emotions. Positive emotional reactions are typically the result of advancement towards a resilient goal or accomplishment thereof. In contradiction to positive emotionality, positive emotions are commonly short-lived response tendencies towards a personally meaningful experience. The author further states that these emotions increase self-esteem and encourage recognition from others.

The literature concurs with the sentiments shared in this study, which illustrate the importance of a positive frame-of-mind in the broader context of expatriation, as well as the impact thereof on the overall success of the experience. Whilst psychological wellness will not be the only factor that contributes to this experience, it is an important factor and cannot be ignored in this study.

6.2.4 Quality of life: Family time and values

In psychology, there has been recognition for the importance of studying people in their natural environments. Stokols (1978, p. 253) states: "at a time when environmentalists and economists are proclaiming that 'small is beautiful', the research literature on human behaviour in relation to its expanding environmental settings continues to expand at a staggering rate". Social ecology (the study of behavioural settings in the environment) impacts on the entire expatriation phenomenon and the quality of family life. The positive impact certain families experienced due to their 'new' environment, was

experienced like an additional benefit. The social rules of the environment have changed to some degree, allowing families to spend more time with each other, as stated by IS, JL, KM, SM, GN.

Furthermore, Greenhaus et al. (2000) proposed the importance of career decisions and the notion that it needs to take into account the satisfaction of work, family and personal needs. They also stated that work and family life have positive and/or negative consequences, and that families, as well as organisations, will face various challenges to manage this. There was good organisational support for families according to some respondents (BL, JL, GN).

It can be assumed that because of this support, the entire experience was viewed as more positive and of a higher quality orientation. Some other respondents (IS, KM, CC) stated that the environment 'allowed' them to spend more time as a family. The literature echoes the importance of family and work-life, and the balance one needs to find between them. It also recognises families as the unit that can contribute to the overall success of such an expatriation experience.

6.2.5 Self-sufficiency

Self-sufficiency could be seen as a sub-category to self-actualisation. Self-actualisation is defined by Maslow (1954) as the instinctive need in humans that motivate them to grow and develop and to actualise them to become all that they are capable of becoming. Schulz (1994) states that self-actualisation is a continuous growth process of determined striving, developing of the self optimally, and becoming a more fully functioning, mature individual. The responses were in two distinct categories as discussed previously. One category was the statements by parents about what this experience had taught their children (BL, KM, JL, MJ, KM).

The second category was made up of respondents themselves who commented on the autonomy and maturity that this experience brought about (SM, MJ, LS). These expatriates have adjusted well to these alternative careers and all its challenges. D'Adrea (2006, p. 98) states that "... insofar as they feel

they can actualize cherished values of autonomy, self expression and experimentation, these subjects seem to have reached the apex of Maslow's hierarchy of human needs by turning it upside down". There is a relationship with the literature in that these individuals experienced personal growth as stated by various respondents (BL, MJ, LS).

6.2.6 Life changing/enriching

Expatriation can be an extremely daunting experience, but for others, a life changing experience. Life changing in the context of this study is not necessarily positive or negative, but rather a learning experience. These individuals experienced stress in some instances during this journey. Antonovsky (1979) rejected the assumption that stressors are innately bad. He developed the salutogenic paradigm, which focuses on the ability of individuals to be healthy and resilient under stressful conditions, as well as optimal coping in everyday living. This paradigm is mainly concerned with stress being a dynamic, manageable process, which generates positive outcomes and effective coping and functioning.

The respondents commented on "mixed" feelings at times, including the stress experienced with the unknown, but at the same time life changing and positive. These were also the sentiments of some participants in this study (HW, BL, MJ, LS, KM). Carrim (2000) found that there is a relationship between the strength of working women's salutogenic construct scores (including sense of coherence) and their ability to cope with multiple roles.

Whilst this study did not focus on gender specific outcomes, the majority of the respondents were females, and there was a strong sense that they were able to cope with these multiple roles (career woman, wife, mother). The women made most of the comments on life-changing experiences, thereby establishing the association with the academic literature.

6.2.7 Selflessness/altruism

According to Burke (1969), identity refers to distinctiveness as an entity in itself and by itself, a differentiated unity having its own particular structure. In most western psychological theories, the personal self or "I" is held as central identity and personality. From Freud's early identification of the individual ego to more recent conceptualisations of social identity groups, the concepts of a distinctive "self" and "self-identity" have been central to Western psychological thought (Gray & Kriger, 2005).

According to Gray and Kriger (2005), in the Buddhist paradigm, leaders think, feel and observe the changing aspects of the world with feelings and sensations, however there is no "self" that directs the experiencing of the world. For Buddhists, the ego, and its attendant desires, is assumed to be the fundamental causes of unhappiness. In place of these, the Buddha advocated selflessness or "no self" (anatta). This means that there is an absence of essential distinctions between us and everyone else. There is also not the denial of the "self". In this stance everyone and everything in the world is intimately unified in a set of endless causal networks. Whilst this concept of "no self" is difficult for most westerners to accept and to understand, a few respondents indicated that they have taken this decision to relocate for the benefit of their families (CC, KM, AE, SM, SR) and not themselves. Gray and Kriger (2005) posit that the consideration of "no self" offers some important implications for a multiple-level of being model of effective leadership based on inner meaning and values. This has an impact on the organisation and whom they select to go overseas on assignment.

Part of this altruistic act could be attributed to the inherent need of a mother to protect, to nuture, to guide, to care and to provide for her child or children. This act of selflessness is one of those typical characteristics mothers would naturally want convey. Mothers expressed all the above statements. It was very different to how fathers reported their roles and reasons for relocation. In research conducted by O'Neil and Bilimoria (2005), they found that the most often mentioned meaning of career for women was "making a difference, being of service, impacting others". The purpose of "serving others" is

expressed through positively contributing to the working conditions of others within the organisation, as well as within the family. Career decisions made for the good of others or to benefit others, result from individuals identifying or prioritising this purpose of altruism (Lips-Wiersma, 2002). Although no direct link was found in the academic literature to support the altruistic act by mothers versus fathers, all the respondents were mothers. The same indirect questions were posed to all respondents (mothers and fathers), thus leaving us with the assumption that 'serving others' was more important for mothers and that it was part of their natural being.

6.2.8 Travel (exploration) opportunities

The opportunity to travel and explore was seen as an added advantage, over and above the main reason, which was noted as career exploration. It can be linked to personality in that certain individuals who enjoy travel might be more outgoing, extraverted, open to new experiences and adventurous. An interview conducted by Catheron Dalton (2005, p. 196) with Eliza Herman (an expatriate produced the following insights from Eliza:

Question by Catheron Dalton to Eliza Herman:

"Extensive international travel such as yours undoubtedly brings with it some challenges. What are some of the more notable challenges, either personal or corporate; you have faced operating in such a wide variety of global markets?"

Response from Eliza Herman:

"With a Western, capitalistic decision making approach, it is very easy to think that other cultures or people in other countries should make decisions based on the same thinking around economics that we would, when in fact their negotiating positions might be driven by quite different needs or value sets. So what's uneconomic to us might be economic to them, or vice versa. One example might be Azerbaijan in the very early 1990s. Azeri leaders put an economic value on access to great training outside of their own country, whereas historically we might not have seen access to training as a big negotiating lever in constructing the terms of a deal. Another

example more common in certain Asian cultures is the whole issue of saving face. This could become even more important than a dollars and cents type thinking in certain situations. Another example involves the purpose of a meeting. Quite often, we may think the purpose of a meeting is to make a decision, but there are cultures where the purpose of the meeting is more a matter of form. The decision will already have been made beforehand, which then drives a lot of different meeting behaviours. If you are operating on the wrong assumption at the wrong moment, it's quite difficult to interpret the meeting behaviour. Respect for hierarchy is another example. In some cultures, this is a big behavioural driver. A subordinate might never openly, in a group setting, speak up unless agreeing with what the boss said. You have been able to apply your HR expertise."

The essence of this experience was that international travel opportunities bring about many other lessons and life experiences such as cultural empathy and economic values. Whilst this is an indirect link to the literature, travel opportunities certainly brings about some advantages, even if it is through learning more about other cultures or economic values.

6.2.9 Financial freedom

Herzberg's two-factor motivation theory contends that providing money will keep some employees from being dissatisfied, but not necessarily motivated. In Herzberg theory, the job itself is the true motivator (Herzberg, 1987). In this instance, one could argue that whilst money was a driver to undertake this decision of expatriation, it was not the main reason/motivation, and secondly, that it is also only temporary. Goal setting theory, researched by Locke and Latham (1990), indicated that individuals are influenced by these goals as they appropriately modify their behaviour to meet these goals.

Goal setting prompts persistence over time, goals energise behaviour, and it mainly motivates individuals to put in the necessary effort to reach these goals. Whilst financial freedom was not the main reason indicated by expatriates, it

was certainly a secondary goal, and for some individuals extremely important as they coupled a time to this goal (for only a few years).

Individuals in this study were very focused in their financial goals as they indicated the extrinsic reward would assist them in achieving part of their financial goals (VGA, DTM, BM, MJ, SR, CC, LS). Organisations face various challenges with internal and external equity. There needs to be remuneration policies within an organisation that need to be equitable and fair. Internal equity refers to the extent to which employees doing similar work are rewarded the same whereas external equity will benchmark with market data in order to establish whether the pay system is fair (Cummings & Worley, 2005). It is a known fact that expatriates sent by organisations earn much more than the 'local' employees, as they are recognised as highly skilled individuals. This could possibly be a warning sign for organisations not to neglect their local employees at the cost of expatriates. On the other hand, organisations might need to hone in on individual needs of expatriates. This is outside the scope of this study, and it is recommended that this aspect be investigated in future research.

The value expectancy model developed by Campbell, Dunnette, Lawler III and Weick (1970) posit that employees will attempt to realise performance goals that they believe will lead to outcomes they value. This could be valuable to the individual, as well as the organisation, and it would seem that in the context of expatriation, the value expectancy model is suited for corporate relocations.

Smelser (1963) states that life sciences (biology, bacteriology, etc.) are concerned with the working of the organism and medicine, with preserving and improving the health of the organism by applying the laws generated by the life sciences and economics as a relatively "value-free" study of the manufacturing, supplying and exchanging of scarce goods and services. For an economic reason, certain individuals had undergone this experience, as there was a promise of better salaries and enhanced lifestyle. By taking up this opportunity, it afforded them to travel as their earning potential increased (JD, IS, BM, BL, JL).

Some expatriates possibly 'escaped' from something, for example unemployment or personal difficulties (CC, DTM). There was a general feeling that they were fundamentally in search of a better personal and/or professional life. This life included an improvement of their financial situation. Expatriation presented a refuge away from situations, relationships or experiences they associated with living in South Africa (CC, EA, KM, DTM, SR). These experiences included affirmative action measures, employment equity opportunities or the lack thereof, racial discrimination and a feeling of redundancy. This experience enabled them to carve out a better way of life or a certain something, which was more aligned with their ambitions.

In this respect, as indicated by some respondents, some (personal relocations) had been proactive in having independently sought an overseas position and establishing a new life, albeit on a temporary basis. This temporary new life would empower them financially.

From an organisational perspective, there are major cost implications due to failed expatriation. According to Schell and Solomon (1997), the growth trend in expatriation increases by the day, with a 30% increase in the American expatriation population. Furthermore, the authors posit that organisations will face challenges to capitalise on the global workforce. These challenges include the most up-to-date information on staff selection, staff preparation to be culturally fluent; supporting the families of expatriates to ensure their success; and managing the cost of these assignments.

Although research indicates that from an organisational perspective, especially to be relevant and to be able to compete globally, expatriation is a 'necessary evil'. It needs to be treated with caution and applied with the utmost care as there are many associated economic disadvantages from an organisational perspective. From an individual perspective, the academic literature on motivation theories supports this notion and is certainly beneficial.

6.2.10 Spiritual experience/meaningful life

Mitroff and Denton (1999) claim that people continuously explore ways in which to practice spirituality in the workplace without offending colleagues or causing acrimony. They believe strongly that unless organisations learn how to harness the “whole person” and the immense spiritual energy that is at the core of everyone, they will not be able to produce world-class products and services. In essence, they imply that without the full expression of one’s spiritual being, one experiences stifling performance which is to the detriment of the organisation.

Furthermore, the authors adopt a humanistic responsibility towards meaning at work and are of the view that people and organisations want and need to be engaged in the matters of importance in a context larger than economic matters. Conger's (1994) definition of spirituality in the workplace or anywhere else is defined as an effort to see our inter-connectedness to one another and to the world beyond ourselves. Spirituality was described by King and Nicol (1999) as the pursuit of uniting the inner and outer world of the individual to bring meaning and purpose to an individual's life. It is the process of searching that can result in spiritual cohesiveness.

In the academic literature, various authors hold opposing views with regard to spirituality and religion. According to Zinnbauer, Pargament, and Scott (1999), a diverse range of definitions was found among hundreds of study participants. Their main finding in the literature was that religion, for the most part, is associated with formal/organisational religion, whereas spirituality was more often associated with feelings of interconnectedness with the world. Enblem (1992) analysed the literature on nursing to determine if such differences exist. The author found that spirituality was defined as an individual life belief, which animates a transcendent quality of relationship to God, while religiousness was defined as a practice of organised beliefs and worship. Furthermore, the author concludes that religion centres around a specific group and the organisation, whilst spirituality is non-specific, may encompass more than one religious belief.

Researchers are cautious to distinguish between the two terms, but many individuals feel that these concepts overlap. The distinction is important for the study of spirituality in the workplace and within the context of this study. For the purpose of this study, religiosity is seen as a component of spirituality, but by definition, spirituality is highly individual and intensely personal. One does not have to be religious in order to be spiritual. Individuals felt that through this experience, they had a life, and not merely an existence.

Another facet of spirituality is workplace spirituality. Although no particular question was asked about workplace spirituality, it is considered necessary to focus on this topic because of the prevalent theme around career opportunities expressed by individuals. Ashmos and Duchon (2000) discussed the components of a spiritual workplace. They state that it includes recognition that: workers are spiritual beings; they have an inner life; and they have the need for belonging or being part of a broader community. Finally, spirituality at work includes the notion that people's need for meaning can be achieved through meaningful work.

Ashmos and Duchon contrast three parts (inner life, meaningful work, and community) of this definition to the literature on organisations, where three similar concepts are found (self-concept, job enrichment, organisational climate). Reviewing the entire literature on each of these constructs would go beyond the scope of this study. However, the intent is to show how the particular dimension of spirituality at work has conceptual roots in similar notions of organisational behaviour and thus deserves attention in the organisation's literature.

According to Vaill (1996), the inner life is defined in three distinct sets. These sets include 'who they are', 'what they are doing', and 'what contributions they are making'. In the context of expatriation, certain individuals expressed a sense of being, to live this experience to find themselves (MJ, LS, VGA). Fox (1994) argues that, if we truly want to understand spirituality, one needs to acknowledge firstly, that people have an inner life which can lead to a more

meaningful and productive outer life. Ashmos and Duchon (2000) posit that employees have spiritual needs, in this instance 'an inner life', just as they have physical, emotional and cognitive needs. Ashmos and Duchon state that this inner need is correlated to two organisational behaviour constructs, the individual identity (which is part of a person's self-concept or inner view of themselves) and social identity (the expression of the inner life).

Shamir, House, and Arthur (1993) argue in the self-concept theory that the congruence between an individual's self-concept (i.e. inner life) and his/her work leads to greater motivation. Furthermore, the authors make the following assumptions:

- People need to be recognised for expression of feelings and self-concepts, and not just viewed as only goal-orientated beings;
- Self-concepts are composed in part of identities which are motivating according to their salience;
- The internal direction and drive of people motivate them to enhance their self-esteem and self-worth;
- People are motivated to retain and increase their sense of self-consistency;
- Behaviour that is driven by self-concept is not always related to clear expectations or to immediate and specific goals.

Of extreme importance for this study is that self-concept theory implies that a job is motivating when there is a high level of homogeneity among the job, its context and the person's self-concept (Shamir, House & Arthur, 1993). Through the expatriation experience, certain individuals found motivation. Earlier in this study the importance of social support was highlighted. Furthermore, the authors found the concept *social identity* emphasises that individuals require a larger social context or group in order to completely understand and express themselves.

In conclusion, workplace spirituality can be viewed as an outcome of the self-concept at work and the social identity that is derived from belonging to a unit at work.

The second notion around spirituality drawn by Ashmos and Duchon (2000), revolves around meaningful work, or differently stated, by them as job enrichment, which is the seeking of meaning in work. According to Etzioni (1986), social psychologists postulate that work has meaning far beyond the economic rewards. Moreover, Pfeffer (2003) argues that people seek much more than technical skills and have an inherent need to do work that has some social value. Fry (2003) refers to this as giving people a sense of passion through meaning, in particular, meaning at work. This particular element of meaningful work is anchored in the job design literature.

Hackman, Lawler and Edward (1971) introduced a new approach to job design described as job enrichment, which takes into account the psychological needs of employees, as well as the previously noted needs (physical, safety). This notion was aligned to Herzberg's (1974) reference to responsibility, autonomy and achievement as important factors in the consideration of worker motivation and performance. Hackman and Oldham (1980) developed a Job Characteristics model and one of the core psychological states of this model is termed "Experienced Meaningfulness". By this, the authors believe that employees need to feel their work is worthwhile. It is therefore important to recognise that individuals do not only have inner-life to drive them to search for meaning, but that part of this meaning is found in work.

The academic literature on spirituality and work reveals that the inner spiritual journey is very important. This is consistent with the individual expressions by respondents in this study. While critical organisational culture primarily focuses on the role of the organisation in facilitating authentic expression of meaning, it remains a challenge.

The research concludes that a positive relationship exists between the individual's spiritual quest, on the one hand, and the organisational environment in which this is enacted, on the other hand. The sub-theme of religiosity did not necessarily influence the broader theme of spirituality. The findings in this study illustrate how individuals make inter- and intra-role career transitions when they found they felt restrained in enacting their life-purpose

authentically. From an organisational perspective, these findings have great importance as organisations are concerned with staff retention.

There has been a focus in the social responsibility literature, which indicates that the type of employees that are making career decisions on the basis of their spiritual values are likely to have the leadership qualities that organisations seek. It is vital for organisations to understand what to do to attract and retain spiritually coherent individuals. Self-knowledge enables individuals to articulate their life purposes and organisations will need to enable individuals to fulfil these purposes. The findings further include traditional vocational career meanings such as self-realisation, service to others, unity with others and the ability to express oneself. They complement and draw together the various strands of literature on the deeper meaning of work and add a more holistic perspective to this important area of research.

Careers and what people expect from organisations are very different today. Azavedo (cited in Santos, 2004) suggests that traditionally, career theorists were pre-occupied with interest and abilities in defining career definitions and models. According to the author, "the career has evolved from a model of bird flight, marked by relatively predictable linear trajectories, into a model of butterfly flight; one that is more chaotic and disordered" (p. 32). This engagement has not encouraged raising deeper questions of meaning into career practice, as the synthesis of decision-making and action is qualitatively different from the synthesis of meaning making. According to Lips-Wiersma (2002), the organisation will benefit by the individual if the personal and organisational purposes are aligned. If that alignment cannot be achieved, individuals may leave or disengage as a result of increased insight into the self.

The literature corresponds strongly with the sentiment embodied in this paper. One important finding is that interviewees were open and honest about their spirituality, indicating that this is becoming an increasingly important theme. Organisations would need to take cognisance of this expression. The search for spirituality and meaning seems to enhance an individual's ability to live purposefully and to make a positive contribution. Strong agreement exists

between many authors that the achievement of a purposeful life was a driving force for many expatriates in living authentically in all aspects of their lives. It is important to recognise that while not everyone in the study articulated the importance of spirituality, there is sufficient evidence supporting this notion.

This study confirms the findings in the academic literature that refers to the impact the existence of a supreme guiding force (defined as spirituality) has on the lives of individuals. The literature may not have established direct links between expatriation and spirituality, however, given the responses; it is noteworthy that spirituality is a force to be reckoned with and an element important to individuals. Organisations should try and pay more attention to this element of the world of work.

According to Benefiel (2005, p. 724), "a growing chorus of scholarly voices is arguing that spirituality is necessary in organisations – for ethical behaviour, for job satisfaction and employee commitment, and for productivity and competitive advantage".

In summary, while academic literature on spirituality and work posit that the desire for meaningfulness influences both individuals and organisations, the literature primarily argues that the individual is likely to benefit by expressing spirituality in an organisational context. Whilst the argument might seem valid, the question remains - what is the ideal way for organisations to respond in order to benefit fully from spirituality? This interesting aspect could be investigated in future studies, particularly in the context of expatriation.

6.2.11 Family and friends support (social and organisational support)

The support of family and friends was a prevalent theme during these experiences. The semi-structured interview asked about the support of this particular network. Many individuals responded that they needed support from this network to help them survive. As stated by Antonovsky (1987), a person with a strong sense of coherence will select a coping strategy that appears most appropriate to dealing with a specific stressor. It seemed that the support of family and friends certainly assisted with their coping with the stressful situation (SM, VGA). According to Lazarus and Folkman (1984), coping is a constantly changing behavioural and cognitive effort, seeking to manage demands (of internal and/or external nature). These demands are experienced as taxing or exceeding the resources of the person, as was expressed by a particular individual: "I got a lot of support from my immediate family – not too sure what I would have done without it" (BL). According to Carver, Scheier and Pozo (1992), coping is defined as an attempt to create conditions that allow individuals to continue moving toward desired goals or efforts and to disengage from goals that are no longer seen to be within reach.

Lazarus (1966) proposed two coping mechanisms namely, problem-focused coping and emotion-focus coping. Problem-focused coping is defined as coping behaviour with the goal of solving the problem or doing something to change the source of stress. Whereas emotion-focus coping has the main goal of reducing or managing the emotional distress that is associated with the situation. Carver, Scheier and Weintraub (1989) suggest that each form of coping (emotional- and problem-focused) may entail several diverse strategies (e.g. denial, seeking social support) while each impact the adjustment process uniquely. For many individuals, the social support received from their network made the adjustment process so much easier (SJ, BM, MJ, SR). The various coping styles deployed would be determined by the interaction of personal needs and preferences and the constraints of the unique situation of each individual. According to Collins, Taylor and Skokan (1990), contend that applying the same coping strategy across all situations is not likely to be adaptive.

The effectiveness of various coping strategies is more or less effective depending on the type of stressor encountered (Pearlin & Schooler, 1978). Moreover, Strümpfer (1995) broadened the salutogenic paradigm to include sources of strengths, which he called fortogenesis. Rothmann (2002) distinguishes between two characteristics of fortological thinking (i.e. benefit-finding and agency). Furthermore, the author posits that benefit finding refers to the level of benefit an individual finds in a stressful situation in order to adjust during the stressful event. These benefits include personal growth, a new perspective on life and strengthening bonds with the support from family. This fortological thinking by the expatriate when it involves social support is viewed positively, making the overall experience more positive and the adjustment easier.

The academic literature found a close link between the well-being of the spouse and children on the one hand, and the expatriate's success and effectiveness on the other hand. The main reasons for failure to complete an assignment were cited as family problems. Two contrasting viewpoints were expressed when individuals reported about their social network, in particular, close family and friends. The one viewpoint had a strong yearning and possibly reliance on the support of family and friends, as this was their extended social network (infrastructure). The heavy reliance on the support of friends made this experience less demanding and more enjoyable.

Analysing the relationship between family and expatriation, Harvey and Novicevic (2001) argued that good expatriate candidates should not be selected for assignments due to family considerations, as the family issues can be significant enough, and would subsequently have a negative impact on the organisation. According to Greenhaus et al. (2000), personal career interests, family considerations and life-style choices often disturb a company's plans with specific employees. They argue that for this reason, to avoid miscalculation of its human resource needs, organisations need to understand the dynamics of career decision-making and be aware of its employee's career concerns. From an organisational perspective, the adoption of an effective coping style is very important, because this will definitely impact on

individual success and performance outcomes, which in turn will have an impact on various organisational factors (such as productivity, organisational effectiveness, job satisfaction, staff turnover). Carver and Scheier (1994) recognised that although coping can change from situation to situation, people do develop consistent ways of dealing with stress and these coping styles can manipulate their reactions in new situations. Individual differences (stable/dispositional and personality dimensions) affect coping in various ways. Previous research found relatively modest links between coping, dispositions and traditional personality variables.

In research conducted by Eysenck (1983), a negative association between neuroticism and task-oriented coping efforts (problem-focused coping) was found. McCrae and Costa (1986) found that dimensions of personality are associated with certain preferred modes of coping. Their study indicated that neuroticism was associated with the use of antagonistic reaction, escapist fantasy, self-blame, sedation, withdrawal, wishful thinking, passivity and hesitancy. They also found that extraversion correlated with rational action, positive thinking, substitution and restraint. Vollrath (2001) reported a positive correlation between extraversion and conscientiousness on the one hand, and problem-focused coping on the other hand. As can be expected, seeking social support is predominantly related to extraversion. Whilst this particular research did not specifically delve into personality types, nor did it elicit any response of this nature, it was clearly stated by individuals how important social support was perceived to be. More recently, Roesch, Christian and Vaughn (2006) stated that neuroticism was also positively related to emotion-focused coping and that extraversion, conscientiousness and openness were positively related to problem-focused coping and emotion-focused coping.

One of the pertinent questions posed was the social support guidance from their network. It was evident that this support would indirectly impact on the success of the overall experience, as well as their career. This support would assist in building an environment that contributes to their overall state of happiness. The majority of individuals interviewed within this study acknowledged that they would never have been able to attain their success

without their supportive social network (family and friends in particular). Judge, Cable, Boudreau and Bretz Jr. (1995) state that the variables, which result in objective career success, may be different from those which result in subjectively defined success. According to Strümpfer (2004), seeking and receiving social support enhances the process of motivational buoyancy. An analysis of UK civil servants showed that high social support was positively linked to psychological health, whereas high job demands predicted poorer psychological health at the follow-up (Hoffman & Tetrck, 2003).

Research conducted by two South Africans, Storm and Rothmann (2003), emphasise a few factors associated with useful coping strategies, such as, emotional stability, or differently stated, low neuroticism, extraversion, openness to experience and conscientiousness. These coping strategies are active problem solving, seeking social support, positive appraisal of stressful situations and recognition and acceptance of stressors. It is apparent that personality and a sense of coherence can act as determinants of the manner in which individuals experience and cope with stress. This is especially important for modern organisations that are constantly under pressure to make the best use of their human capital (Senior, 2003). In research conducted by Tung (1981), it was found that more male expatriates engaged in sports and drinking as specific coping mechanisms, whilst on the other hand, women expatriates resorted to more communication with friends and relatives back home to cope with loneliness.

Organisational support has been studied in the academic literature and found to be very important for the overall success of an expatriate assignment (Black & Stephens, 1989). In a similar manner, Black (1992) argued that the inability of the immediate family to adjust to the host country environment is one of the prevailing reasons for expatriation failure. According to Coyle (1996), organisations have a tendency to reduce the material and counselling support provided once an employee has had previous overseas experience. This could be an erroneous assumption, as the contextual factors for every assignment can be different thus requiring different organisational support techniques. In situations where emotional intelligence is present, studies have shown that a significant part of an organisation's profitability is linked to the quality of its work

of life, which is based largely on trust and loyalty both within the organisation and with outside people, such as customers and suppliers. Profitability is also linked to the way employees feel about their job, colleagues and company (Cooper & Sawaf, 1997).

Many organisations contend that their employees are their most valued assets. However, employees become frustrated due to a mismatch with the job and the person, and these frustrations stifle their growth and development paths in the organisation, which can ultimately turn into liabilities, either through poor performance or voluntary termination. Therefore, it is in the best interest of the organisation to help its employees plan and manage their careers.

Moreover, to ensure a steady movement of human resources to key positions, an organisation needs to understand on what their employees base their career decisions. It is no longer practical for an organisation to assume that employees will automatically accept promotions or other job assignments offered to them, as matters like personal career interests, family considerations, and life-style choices often derail plans made by the organisation (Greenhaus et al., 2000). This problem is exacerbated by the global economy and career opportunities available, as well as pressure from highly achievement-orientated employees. Organisations therefore need to understand the principles of career management in order to achieve success in meeting these challenges. Part of these challenges lie in the successful support of the expatriation experience (Greenhaus et al., 2000).

Two key consequences of successful organisational practices are employee citizenship and reduced conflict between employees and management. Both of these have been widely identified as crucial for economic competitiveness (Drucker, 1993). Employee citizenship behaviours are described as deeds on the part of the workforce or employees to improve productivity and cohesion in the workplace. Organ (1988) states that these actions are above and beyond role requirements and includes actions such as co-operation, taking pride in work, and freely giving extra effort and time to meet ongoing organisational goals. Employee citizenship is thus basic to achieving flexibility in rapidly

changing markets (Leana & Van Buren, 1999). The implicit model of organisational productivity and effectiveness in studies that highlight employee citizenship is one in which technical factors of production and organisational leadership must be supplemented by worker effort and enthusiasm in order to reach optimal or even competitive levels.

Furthermore, Greenhaus et al. (2000) state that 'family responsive organisations' have a lot to benefit from the services of valuable human resources because they assist employees to resolve difficulties and to achieve balance between work and family responsibilities. In the framework of expatriation, family responsive organisations can provide more flexible work schedules, especially at the onset of the assignment, to cater for child care arrangements, and be attuned to individual needs of expatriates and their families.

As discussed previously, the hiring of expatriates is a very challenging task due to the high direct and indirect cost of lost productivity involved. Harvey and Novicevic (2001) have developed an eight-step expatriate selection method that focuses on managerial, transformation-based and input competencies. It takes into account the subject's use of multiple intelligence measurements (one of them being emotional intelligence), learning and thinking styles, task categorisation and the internal/external environmental context. While it is difficult to argue that such an approach would result in selecting the best possible expatriate for the job, it remains highly uncertain whether companies will find the resources and the will to apply such a cumbersome method.

The findings of this research indicated that the support of family and friends certainly impacted on the overall experience and contributed in some form to the success of the expatriation experience. Family in this context included spouse, children, parents, grandparents and siblings. In summary, the evidence is clear that social support during an expatriation experience increases psychological well-being, which in turn increases the overall productivity of the individual. In a similar vein, Varner and Palmer (2002) listed the most common problems for expatriate failure. These included inadequate selection procedures, lack of training, premature departure, ineffectiveness of

expatriates and family problems as influencing poor job performance directly. There was also a relationship with personality factors mentioned by Storm and Rothmann (2003) and preferences for coping styles. How strong this relationship is, is beyond the scope of this research and would warrant further investigation. Certain elements of the findings in this study were congruent with the existing literature, while others were less congruent. This would depend on each individual, their relationship with significant others and their valuing of a social network.

6.2.12 Openness to experiences (embracing change)

From a socio-analytic perspective, Hogan (1996) suggests that people have evolved in their ability to portray a standing or status consistent with society's view of success, to ultimately achieve status and acceptance. He further states that, having certain personality characteristics will affect how well an individual is perceived to be suited for a given role. In the context of expatriation (from an organisational stance), this suggests that expatriates who possess important personality traits would be perceived as better performers on their assignments (Caligiuri, 2000).

Gallagher (2005) argues that the desire to explain an individual's behaviour, whether it be for the sake of understanding the origin of their actions (i.e. to learn from their successes and failures) or perhaps to rehabilitate them, has motivated a multitude of personality theories. Jordan & Cartwright (1998) conclude that selecting someone for an international assignment requires something more than the usual stringent criteria for outstanding performance in a domestic scenario. A review of the literature pertaining to the selection of international managers does, however shed some light on the matter. According to the authors, by identifying those characteristics that constantly show themselves, and by organising these characteristics into a coherent set of variables, one can begin to see the basis of a psychological profile of stable personality traits that may be useful in selection. According to Caligiuri (2000), personality characteristics are often understood as dispositional motives utilised during goal attainment. This signifies that personality characteristics predispose humans to behave in certain ways, given particular circumstances, in which to

accomplish particular goals. Although many personality characteristics exist, research has found that five factors provide a useful typology or taxonomy for classifying them and these five factors (labelled the “big five”) have been found repeatedly through factor analyses and confirmatory factor analyses across time, contexts and cultures (McCrae & Costa, 1986; 1999; Buss, 1991; McCrae & Oliver, 1992). The Big Five personality factors are: (1) Extraversion, (2) Agreeableness, (3) Conscientiousness, (4) Emotional Stability, and (5) Openness to Experience. Buss (1989) argues that the extension of the Big Five personality characteristics as predictors of expatriate success can be theoretically justified through evolutionary personality psychology. The latter proposes that the Big Five personality characteristics are universally adaptive mechanisms for humans to ultimately do two things: reproduce and preserve life.

Caligiuri (2000) posits that emotional stability, as a personality characteristic, is universally adaptive and enables humans to cope with stress in their environment. This stress is associated with living and working in unpredictable and unfamiliar environments.

According to Mendenhall and Oddou (1985) emotional stability is an important personality characteristic for expatriates to adjust. An expatriate's inability to cope with the stress of the assignment would likely trigger both personal and professional withdrawal behaviours (depression, absence, and turnover). An expatriate's physical withdrawal may manifest in a terminated assignment, whereas mental withdrawal (depression, poor concentration) may result in poor job performance.

Research done by Van der Bank and Rothmann (2002) indicates that emotional stability is positively related to the expatriates' desire to remain on the assignment. It would be worthwhile for organisations to invest more in assessing emotional stability as part of their selection process.

From the perspective of evolutionary personality theory, Buss (1991) argues that humans must have the sensitivity to correctly assess their societal environments to ensure the preservation instinct (who to trust, who to follow, who to marry).

The social cues of the host country could be very ambiguous and not easily interpretable, thus challenging the expatriate's ability to correctly assess the social environment.

Consistent with this, Ones and Viswesvaran, (1999) proposed that expatriates need additional abilities to perform in a more complex work environment. In reviewing the literature, Caligiuri (2000) found that scholars have suggested that greater openness or intellect is related to expatriate adjustment because individuals who are higher in this personality characteristic will have fewer rigid views of right and wrong, appropriate and inappropriate, and so forth, and are more likely to accept the new culture. In turn, as Tung (1981) found, cross-cultural adjustment is directly related to whether an expatriate will complete his/her assignment.

According to Barrick and Mount (1993) individuals higher in openness to experience have more positive attitudes toward learning, experiencing new things and perceiving challenges as opportunities for growth. It is likely that individuals high in openness to experience will perceive greater personal accomplishment in the cross-cultural adjustment to the host country and job performance.

These types of characteristics are also referred to as Promethean qualities, which include courage and dynamism, risk-taking, adaptability and flexibility. These individuals are able to live in uncertainty and ambiguity. Kozloff (1996) concluded that few organisations today give candidate selection the interest it warrants when it comes to international assignments. He further states that in 90% of the companies responding to Selection Research International's 1995 Survey of International Sourcing and Selection Practices, line managers use technical skills and the willingness to relocate as their key criteria for candidate selection. When asked to determine the principal factors contributing to failed assignments and ineffective performance, these same companies pointed to "personality characteristics" and "interpersonal style" as the culprits.

Hullinger and Nolan's (1997) research on American expatriates working in China produced some interesting facts. The single most consistent theme that came out of this research could be categorised as personality traits. Although preparation and prior experience were seen as relevant, virtually all subjects focused on the notion of 'personality'. When discussing their own successes and failures and those of fellow expatriates, subjects used words such as flexibility, tolerance, open-mindedness, independence, risk-taking, curiosity, patience, stability and sensitivity to other's values.

Brewster and Harris (1999) concluded that criteria of effective international managers consistently highlight the importance of "soft" skills such as self-awareness, flexibility, intercultural empathy, interpersonal skills and emotional stability. However, surveys of international selection practice within organisations show that most rely on technical competence as a prime determinant of eligibility for international assignments. A survey of International Assignment Practice conducted in 1997 also shows that only 8% of international organisations use any form of psychological testing during the selection process. Monitoring performance whilst on an expatriate assignment requires an understanding of the variables that influence an expatriate's success or failure in a foreign assignment. Three critical variables are the environment (for instance culture), job requirements and the personality characteristics of the individual.

It is evident from the academic literature that personality plays a role in the overall success of the expatriate assignment. It is important for organisations to invest more in psychological assessments in order to find the most suited person for the job. From an individual perspective, it would be useful to be aware of one's personality when deciding to undertake such an experience. A suggestion for future research would be to correlate the success of an expatriate assignment with the outcome of the personality assessment.

Another interesting finding in the literature is that self-actualised individuals have the capacity, to cope with change because of their flexibility and toughness (Benjamin & Looby, 1998). These types of individuals are described to possess,

(in addition to the characteristics listed above) a few other characteristics (a sense of responsibility, commitment, acceptance, duty, obligation and commitment) that enables them to use their potential to the fullest. Psychologically, to have this kind of disposition to the concept of foreignness or alienation implies that this type of person has a high propensity for risk-taking. These individuals personify risk-taking traits, they welcome new experiences, they embrace change, and they are optimistic and hopeful. Jex (1998) proposes that individual differences have a major impact on the health and well-being of the individual and subsequently the organisation.

On the other side of the continuum, the decision to confront foreign terrain, as previously discussed, can create a lot of anxiety for others. Within the framework of expatriation, it is important for organisations to assist where they can with employees who possibly feel anxious because of the unfamiliar environment.

According to Richardson and McKenna (2000), this type of anxiety might lead to other performance dysfunctions and could at some point be debilitating, thus affecting the employee's performance, which has a direct impact on the organisation's performance. A common criticism of expatriates about international assignments is the seclusion experienced while abroad. Prolonged isolation could lead to dysfunctional behaviour, including misguided judgements and decisions, physical and/or emotional problems, which all have a bearing on the outcome of the expatriate's experience.

Richardson and McKenna (2000) conducted a study with expatriate males and females and compared their ability to cope with the loneliness and the resultant stress and strain associated with such conditions. The results revealed that the female expatriates were significantly better able to cope with such seclusion. The authors argue that one could possibly explain this difference by the fact that previously, women were excluded from existing networks, hence they have become more adept at surviving and perhaps even thriving under conditions of isolation and loneliness.

Beyer (1999) postulates that since humans are social animals, they seek a sense of belonging. Richardson and McKenna state that expatriates might find it extremely challenging to cope when they have this 'outsider' mentality. If they experience expatriation in this way, it might have a negative psychological and professional outcome. They recommend that employers manage such problems proactively by putting human resources systems in place. They may suggest that if the feeling of being an "outsider" is experienced negatively, it might impact on job performance.

The third dimension of the definition of Ashmos and Duchon (2000) on spirituality at work has to do with the notion that as spiritual beings people live in a broader social context within a broader community. In his examination of management practices that build or hurt the spirit, Pfeffer (2003) notes that people value work in a social context when they feel part of a larger community.

There is a need for identifying strongly with the community. Michell, Holton, Lee, Sablinski and Erez (2001) use the term job "embeddedness" to describe the influences of employee retention. Being embedded and thus less likely to voluntarily leave a work setting, means having links with other people at work. The workplace community fits with other aspects of an employee's life spaces and the "cost" or sacrifice required for leaving the community is high.

The work of Michell et al. (2001) showed that when people feel embedded in a community at work they are much less likely to leave. When individuals feel part of a work community and identify themselves with the group's purpose, it is only then that the increasingly complex work of contemporary organisations can be achieved.

There is consensus in the literature that successful expatriation and the openness to embrace change will largely depend on the individual and his/her personality characteristics, rather than the organisation or the broader environment. The role the organisation can play more effectively is to put

certain measures in place in terms of their selection process to identify the most suitable candidates. The literature supports the feelings shared by individuals that one's flexibility and adaptability contribute mainly to the success of this experience.

6.2.13 Patriotism

The Kirkpatrick (1995) defines a patriotic person as one that "loyally supports one country" (p. 588). Wikipedia defines patriotism as love of and/or devotion to one's country. The origin of the word is Latin (*patria*) and Greek (*patris*). However, "patriotism," or the love of one's country, has come to have different meanings over time, and factors influencing this meaning include context, geography and philosophy (retrieved 25 September 2008 from <http://en.wikipedia.org/wiki/patriotism>).

Habermas (1996) argues that the word patriotism is at times used interchangeably with the word nationalism. In the framework of the ancient Greeks, patriotism consisted of concepts concerning language, religious traditions, ethics, law and devotion to the common good, rather than pure identification with a nation-state (Bar-Tal & Staub, 1999). Patriotism has its roots in philosophy.

Blattberg (2000) says that for the Greek philosopher Socrates, patriotism promotes analytical questioning in a pursuit to improve the country, rather than agreeing with everything one's country does. This could be contrasted to the two opposing views expressed by South Africans who had undergone expatriation as an experience. For example, some respondents stated that they do not agree with the implementation of employment equity.

Gomberg (2002) argues that patriotism is much more than nationalism, and includes providing charity, criticising slavery, disapproving excessive penal laws. He argues that there needs to be an inherent sense of responsibility towards fellow citizens, if one views patriotism in a larger context. Gomberg compares patriotism to racism, in that a person has more ethical obligation and responsibilities to fellow members of the national community, than to non-

members. Patriotism, in this definition is therefore selective in its altruism, as preference is given to one's fellow members.

In South Africa much emphasis has been placed by both the State and employers in the private sector on the "empowerment" of employees. Granting political power to all citizens in 1994 can be considered as the watershed in the process of national empowerment. Legislation regarding equal opportunities, affirmative action and skills development has continued to stimulate the transfer of power to the previously powerless.

More recently "Black Economic Empowerment" (BEE) has become a national priority and forms the headline of many reports on the business pages of national newspapers. State and private organisations alike opted for a more participative management style. However, Khosa (2001) is of the opinion that even after introducing new corrective policy measures in South Africa, discrimination and poverty, and consequently powerlessness, continues to exist. The question whether employees in the new dispensation indeed feel empowered (experience psychological empowerment) remains largely unanswered.

Most of the individuals partaking in this study felt very positive and wanted to be associated with their country, being South Africa. A few individuals questioned certain laws (in particular the Employment equity Act) of South Africa, as they did not agree with this stance of their country. There is still a large gap in the literature with regard to patriotism and all its applications, within the framework of expatriation and South Africa.

6.2.14 Cultural empathy

Cultural empathy is well researched and perceived in the academic literature as one of the key components for successful expatriation (Tung, 1981; Black & Stephens, 1989).

According to Stening and Hammer (1992) the international business community are continuously challenged by cultural differences. In the Japanese and Arabic cultures, direct eye contact is considered a sign of aggression. The Japanese person avoids eye contact as a sign of reverence and respect. In the predominantly western cultures, by contrast, direct eye contact is expected as a sign of honesty and sincerity.

The importance of understanding and taking cultural differences into account cannot be emphasised enough, as the danger lies in sending the wrong message or misinterpreting the intention of other people. In an increasingly global environment, organisations are faced with ethical dilemmas in decision-making. According to Wines and Napier (1992), managers face a predicament when selecting and applying moral values to decisions in cross-cultural settings. While moral values may be similar cross cultures their application, or differently stated, the ethics to specific situations, may vary. Selmer (2000) states that close cultural distance do not necessarily imply easier adjustment.

The expatriate adjustment process, which sometimes leads to failure, may become an international crisis for global organisations. The academic literature identified the reasons behind the failure, including the lack of cross-cultural adjustment by expatriates, their spouse or family are also some identified features (Riusala, 2000; Shaffer, Harrison & Gilley, 1999; Black, 1992; Black & Gregersen, 1991).

Research conducted by Black and Gregersen (1997) confirm that between 10-20% of United States expatriates sent to other countries return ahead of time due to culture shock or job dissatisfaction. Forster (2000) postulates that whilst direct cost is easily measurable, many a times, it is not the case for indirect cost. He argues that indirect costs could include factors such as loss of market share

and difficulties with the host government. The academic literature seems to agree that one of the main reasons for expatriate failure lies in the selection of these individuals. For instance, Clarke and Hammer (1995) found that interpersonal skills assist in the cultural adjustment of the expatriate and his or her family. Focusing on these types of assessment tools (interpersonal tools) for expatriate selection is an organisation function worthy of greater consideration. Proper training programmes to prepare and equip expatriates will benefit the individuals and the organisation.

Several studies (Harvey & Novisevic, 2001; Selmer, 2000; Dowling, Schuler & Welch, 1994) have concluded that technical competence in a specific discipline, although one of the dominant bases for selection, has a modest impact on the ability to adapt to new cultures, to deal effectively with co-workers or to adopt foreign behavioural norms.

The factors that seem to ease the cultural adaptation include personality, expectations, prior overseas experience, motivation, language skills, intra- and intercultural relationships, preparation and training. Black and Gregersen (1991) argued that international adjustment was previously regarded as a unitary phenomenon, but developed a model that is a multidimensional concept, including three dimensions. These dimensions of in-country adjustment are:

- adjustment to the general non-work environment;
- adjustment to interacting with host nationals outside work;
- adjustment to work.

The prevailing theme in this particular research project, which was expressed by individuals as cultural empathy was very well supported in the academic literature. It would be interesting to determine in future research whether the fact that South Africans with their context and exposure to various cultures would make them more adaptive in the broader context of expatriation.

6.3. METHODOLOGICAL APPROACH

Grounded theory has been the particular methodological approach used to unravel the elements of the experience described by the various individuals. This research project had its own unique sequence and detail such as the interpretations, the experience of the researcher and all the elements that influence the entire research process. The researcher, in an attempt to eradicate any bias, prejudices or ambiguous interpretation, used direct quotes from the participants.

All personal interpretations, general statements and observations were clearly indicated in this research report. Kerlinger (1973) describes reliability and validity as evaluative properties, which reveal the effectiveness and the magnitude of errors in measurements.

According to Kerlinger (1973), reliability involves the consistency of measurements, meaning that one would need to get the same results if different people in different situations repeat the same process. To ensure reliability, all individuals were e-mailed their narratives, allowing them the opportunity to alter, add or change any misinterpretations of their responses. A rating scale developed by Cooper and Schindler (2003) was e-mailed to each respondent to indicate whether they strongly agree or disagree with the interpretations of the raw data.

The categorised raw data with interpretations was sent as an attachment for each respondent to verify. There was an opportunity for individuals to state their disagreement, and alter any misinterpretations. Of the respondents, 68% completed the validity scale and none of the respondents disagreed with the interpretations of the raw data. One of the respondents (SM) could not be reached to verify the interpretations.

Validity, as defined by Kerlinger (1973), is a psychometric prerequisite for a measurement procedure to ensure that the intended construct is measured. In other words, the extent to which the measurement instruments accurately

measures what it is supposed to measure. The researcher employed various techniques to ensure validity, such as:

- The semi-structured interview questions were unbiased and objective in order to ensure neutrality;
- The interpretations were assessed to minimise personal bias, prejudice or any other potentially negative influences on the process;
- The application of the procedure was verified with an expert in the field to reduce inaccuracy with the application;
- The openness of the questioning technique assisted with the overall validity.
- The researcher kept all statements received from individuals exactly as they were presented in order to prevent invalid interpretations;
- The interpretations of the individual's responses were validated with each respondent to ensure its validity.

Furthermore, the researcher, in her endeavour to do justice to the phenomenological orientations of this study focused on the following:

- Behaviour and experiences of individuals were interpreted within the framework of the actual way human beings experience life;
- Emphasis was on unique experiences, as well as recognition for open processes in conducting of research;
- Acknowledgement and recognition of the importance of context and social structure was recognised;
- Theory was generated from interviewing data by using an inductive reasoning process;
- The data collecting, coding and analysis occurred simultaneously rather than as separate components of the research design;
- An attempt was made to suspend preconceived ideas about individuals from various race groups, cultures and socio-economic groups.

Having recognised all expatriation experiences and the uniqueness of the individual, this chapter endeavoured to correlate findings with existing academic literature and discuss these relationships in detail. Now that these links have been established, the final chapter will discuss the impact these

expatriation experiences has on an individual and the organisation, as well as present recommendations for future research.

CHAPTER 7

CONCLUSION

7.1 GENERAL OVERVIEW

The purpose of the study was to gain a deeper understanding of the expatriation experience. This was obtained from the shared experiences of those who took the proverbial “first steps” into the novel and unknown. The expatriate phenomenon was studied within the context of career psychology. Twenty individuals shared their unique experiences of expatriation. The qualitative research paradigm was chosen as the most relevant method for exploring these experiences of their worlds as lived in a foreign country. The researcher believed that the qualitative paradigm was best suited to explore the unique meaning individuals attach to their experiences – “experience as reality – we are our experience” says psychiatrists Binswanger and Boss (<http://www.psych.utorento.ca./users/peterson/existentialismtherapy/ppframe.htm> retrieved October, 24, 2008).

Patton (1990, p. 7) states that: “there is only the world to experience and understand. Qualitative inquiry cultivates the most useful of all human capacities – the capacity to learn from others”. Individual experiences were gathered by conducting interviews and the data was extrapolated without considering other situational factors (such as interviews with broader family members, social network and employer). The purpose of the semi-structured interview was to provide each individual with an opportunity to share these experiences, as unreservedly as possible. Identifying the phenomenological stance and acknowledging the human being for what he/she believes to be their distinctive experiences were the processes that were engaged in this investigation. Narratives/protocols were considered the raw data and initially accepted as such and then analysed to establish the meaning within the industrial psychological framework.

The observations deduced from the interviews were intangible aspects. These included choice of words, writing styles, choice of questions answered, manner in which the questions were answered, depth of expressions, use of punctuation, point written style versus paragraph/story-telling style, certain words highlighted, italicised and underlined, general tone/spirit in which these experiences were transcribed. There is a likelihood that certain elements and characteristics, which could have given a different perspective on the entire experience, did not come to the fore. The broader social network was not interviewed which could have provided a different perspective on this entire experience.

From the researcher's perspective, there was a constant awareness of various factors that could have influenced her objectivity, such as her own stereotypes, bias, preconceived notions about individuals from different race groups, cultures, socio-economic status and other factors. The researcher made every effort to bracket her preconceived notions very diligently and to respect the views of the individuals as reported by them.

Many definitions of expatriation exist however; the Wikipedia definition of an expatriate was applied. An expatriate can also be defined as an individual who temporarily or permanently relocates to another country and culture different from that of the individual's upbringing and/or legal residence. The origin of the word comes from the Latin word *ex*, meaning out of, and *patria*, meaning country (Retrieved 18 January 2008 from <http://en.wikipedia.org/wiki/expatriate>). The individuals who participated in this study were all willing to share their unique personal experiences of their journey into the unknown. Although many contextual factors contributed to the uniqueness and distinctiveness of these experiences, there were many commonalities within these experiences. The prevalent theme that arose from these shared experiences was that the individuals, in their search for meaning and purpose, accomplished what they initially might have considered to be inconceivable.

The second most significant theme that emerged from these experiences was that one's attitude would determine whether this endeavour would be successful or not. Research indicates that certain individuals, who possess certain personality characteristics, will take the decision to challenge the unfamiliar, even in the absence of support. Taking the decision to challenge the unfamiliar, personifies the personality characteristics of the Promethean Spirit. Those individuals who found this experience to be worthwhile expressed all personal characteristics such as achievement-orientation, openness to change, seeking adventure and cultural empathy. A common thread running throughout their narratives was that individuals would go beyond the normal boundaries to advance their career. The saliency of careers in giving meaning to persons' lives must never be underestimated. All those who manage the careers of others are called upon to be sensitive to the reality of work being integral to that which defines the whole being – not part of him/her, but essentially integrated into their being and becoming.

Given the South African context as a developing country, Edwards (2008) states the importance of a holistic perspective. Furthermore, support and recognition of spirituality and the significance of continuous practising for personal, collective and cosmic transformation were regarded as absolutely essential. This particular approach, in line with holistic psychology, indeed entitles the researcher to gain a deeper understanding of the total being in his/her eigenwelt, mitwelt and umwelt (Binswanger, 1963). In a sense one person is like no other human being, and in another sense, the person is like some other human being, and in yet another, like all other human beings - unique individuals, social beings and yet essentially human beings in the world in which they find themselves. This approach allows the researcher to unearth how individuals in their personal world (eigenwelt) think about themselves and their careers, often experiencing anxiety and yet motivating themselves to be strong, to move existentially forward, to become new. The learnings were evident from how these individuals have experienced this expatriation phenomenon in their mitwelt (their world with others) in that they valued the support of family and friends tremendously and supported their spouses and children during this process. They acknowledged the value of this support as

they recognised their connectedness to the other-in-their-world to which they felt inextricably linked. In the *umwelt* (relationship to the world around them), these individuals learned more about the respective countries and their country of origin. They were able to be and function in a new world by seeing and noticing old prejudices. They were enriched by a new awareness of an eclectic self as they shed the vestiges of the past. These individuals noticed growth within them and within their children while feeling enriched by the experience of having conquered the challenge.

The implications these experiences have for the discipline of industrial psychology and occupational psychology need to be recognised. It serves to enlighten us about the value of resilience, loyalty and belief in oneself, faith in others and in powers from beyond from where it is sought. It shows why it is important to inculcate these values in the family, the schools and training institutions. These are the values Schreuder and Coetze (2006) found are necessary to deal with the challenges of careers in the 21st Century. In career counselling, industrial psychologists have to encourage persons to strive towards and to acquire a true Promethean Spirit. One learns about the struggles and the strengths of human beings – what it is to be a human in a new, if not, chaotic or threatening environment. Within the international human resources arena, industrial psychologists could possibly search more actively for measures that could identify the qualities that will enhance adjustment.

7.2 RECOMMENDATIONS FOR FUTURE RESEARCH

The findings of this study indicate that the support of family and friends certainly impact on the overall experience and contribute significantly to the success of the expatriation experience. Family in this context include spouse, children, parents, grandparents and siblings. In summary, the evidence is clear that social support during an expatriation experience increases psychological well-being, which in turn increases the overall productivity of the individual. This

suggests that career counselling should equip and prepare workers for expatriation and that it should be extended to reach the other members of the nuclear family and in some instances, even the closer extended family.

Storm and Rothmann (2003) indicated that there is a relationship between particular coping styles and personality. How strong this link is, would warrant further investigation, especially in the context of the expatriation experience. A question which arose in this study, was the extend to which personality characteristics feature in the context of expatriation, and whether global organisations can benefit from recruiting individuals with certain personality characteristics that they can send on assignment. It begs the question whether individuals with certain measurable personality characteristics are better predisposed and suitable for successful expatriation.

The implications extracted from a study of this nature and size, focusing on a specific group of individuals, will need to be explored further using both qualitative and quantitative methods. Furthermore, it could also be expanded to include respondents beyond the countries included in this study.

In summary, while academic literature on spirituality and work posit that the desire for meaningfulness influences both individuals and organisations, the literature primarily argues that the individual is likely to benefit by expressing spirituality in an organisational context. Whilst the argument might seem valid, the question remains - what is the ideal way for organisations to respond in order to benefit fully from spirituality? This aspect could be investigated in future studies, particularly in the context of expatriation.

Further research is needed to establish:

- Whether the findings in this study, regarding spirituality, can be applied as a diagnostic model, allowing organisations to assess their readiness to respond to spiritually orientated people and
- Whether organisations that enable individuals to express their spirituality, encourage better performance.

- Whether the individuals that are enabled to express their spirituality are better performers

The use of grounded theory as a research approach to gain an in-depth understanding of how expatriation is experienced is recommended for future research. It is suggested that the derived understanding gained through the inductive method, could in future be incorporated into projects of organisations aimed at facilitating more effective management of expatriate processes. This technique allows for the opportunity to speak as openly and freely about personal experiences, which traditional quantitative methods might not be able to extrapolate.

According to Coyle (1996), organisations have a tendency to reduce the material and counselling support provided once an employee has had previous overseas experience. It could be an incorrect assumption for organisations to make that a once-off intervention for all persons would be enough. Individuals and their circumstances differ, thus the contextual factors for every assignment can be different, so that a more individualised and tailor-made type intervention and support strategy should be considered.

It is a known fact that expatriates sent by organisations earn much more than the 'local' employees, as they are recognised as highly skilled individuals. This could have some implications for industrial relations issues where those, who do not benefit to the same extent, might perceive some favouritism extended to the expatriates. This was not within the scope of this study, therefore, it is recommended that the experiences and perceptions of those not considered for these "benefits" be investigated in future research.

It would be interesting to research whether South Africans and their context and exposure to various cultures, race groups and socio-economic status are more adaptable in the broader context of expatriation, when compared to other countries (UK expatriates or Australian expatriates). One would wonder to what extent eclecticism has already been ingrained into the mind of South Africans especially when one considers their ethnocentric background.

7.3 CONCLUDING COMMENTS

The ultimate purpose of this study was to explore expatriation experiences, in order to gain insight into individual- and organisational adjustment, as well as constructing some guidelines for organisations to implement. These individual insights could assist organisations to create appropriate career management strategies, which could be applicable in foreign countries. If organisations apply suitable career management and career counselling strategies, it could assist individuals in their pursuit of more satisfying career paths. It would not be unreasonable to assume that it could enhance the kind of personal fulfilment that will ensure a better quality employee. Training courses in human resources management would need to include training in the skills and values required to equip workers so that they will be able to operate professionally in an ever changing, highly challenging technocratic world.

Occupational and career psychology is indeed psychology. Industrial psychologists would be well advised to adopt a holistic approach such as explicated by Edwards (2008). Only by doing so, could they really proclaim to be human scientists.

The influence of the expatriation phenomenon, particularly within the context of careers, is profound and can no longer be ignored. The expatriation phenomenon is increasing, with no decline foreseen in the immediate future hence the soaring interest into this phenomenon, as it has already impacted significantly upon organisations and individuals.

The impact expatriation has on family life, organisational strategies and the career path of an expatriate, has been unearthed in this particular study. Recognition was given to the uniqueness of these experiences and the contextual factors impacting upon it. The key discovery was that there are indeed individuals who would pursue their career aspirations despite the anxieties posed by the challenges of the unfamiliar.

A famous mountain climber was asked what his motivation was to attend such challenging, if not life threatening pursuits? He answered: "Because it is there". The desire to conquer that peak got the climber out of bed and sent him to the top, through snow, rocks slides and cold winds. Without the desire, many activities would not be finished. There must be the desire to be the owner of a business and to endure the stress, fatigue and occupational boredom of such a hard task (Hoffman & Russell, 1994). As for the expatriation experience, there must be a desire to conquer, that which is there.

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