

Expatriates Management In Cross Cultural Context: A Study With Special Reference To Indian Expats

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Executive Summary

An expatriate is an employee who is working and temporarily residing in a foreign country (Dowling, Welch, 2009). Some companies call such employees “international assignees”. Apart from the company supporting the expatriates during their assignments, the expatriate faces difficulties in terms of inability to adapt, difficulties with family adjustment in the new location, difficulties associated with different management styles, culture and language difficulties, issues associated with the accompanying partner’s career development. According to the 2011 Global Relocation Trends Survey report from Brookfield GRS, there was a 61% increase in expat assignments in 2011 following a downturn the previous year that resulted from economic pressures. Moreover, the study highlighted the role of family dynamics in expatriate assignments and cited the top challenges as partner resistance (47%) and family adjustment (32%).

The primary aim of this paper is to study the expatriate problems and issues among the Indian expats. In addition it is to know the factors influencing expatriation among Indian expats. The data was collected during Last quarter of 2014 and first quarter of 2015. Employees who had travelled on international assignments for a minimum period of three months to three years were considered as respondents for this study. A total of 407 expatriates were contacted through snow ball technique and 334 had responded for a response rate of 82 percent. Structured questionnaire along with semi-structured interviews were used for collecting data. The results of the study indicate that, expatriation is a painful process in the initial years in terms of adjusting to the socio cultural aspects and the work related aspects in the foreign country.

However, if the supervisory officers are co-operative along with the peer support, expatriates can excel in the assigned portfolios and can give effective productivity in terms of deliverables and service quality.

Key words: Cross cultural training- work environment- intellectual capital- skilled professionals

Introduction:

With the globalization of businesses, opportunities and challenges, the need for expatriates in global locations becomes the need of the hour. Internationally, HR Executives need to understand and note the signs of potential global assignment requirements and their impact on the overall performance of business and long term goals of the firm. International projects are affected by many factors that potentially affect the adjustment of expatriates such as personal factors, previous international experience, cross- cultural training, job factors, organizational culture, work environment and value system as well as various non-work factors (Black, et al., 1991). The processes of expatriate staffing and completing legal formalities are expensive and complex, particularly when the company has to pay taxes for the parent-company employee in both countries (Deresky, 2011). Effective selection and ensuring the cross cultural management for expatriates contributed to the growing awareness among business objectives and the requirements from the employees' side in terms of intellectual capital expertise.

Who is Expatriate?

Expatriate refers to foreign job assignments for a specific period of time (Wang, 2008). Many organizations that have currently succeeded in their national markets have taken their businesses globally. This globalization of businesses is increasing the demand for skilled expatriates to manage the operations of global firms (Olsen & Martins, 2009). For example, 80% of medium-sized and large-sized companies have employees abroad, and 65% expect the number to increase. Also, 54% of the expatriates are getting younger (20-39 years old up from 41%). The trend indicates that the number of women expatriates is also increasing by 21% from historical 15% (Ball et al., 2010). A survey by Mercer (2008-2009) also showed that international assignments are on the rise. This survey encompasses 243 MNCs who operate globally with 94,000 expatriates (compared to 50,000 in 2005-2006). About 47% of employees experienced an increase in the deployment of traditional expatriates. Also, there has been a 38% increase in those employees that are considered nomads who move from country to country on multiple assignments. Moreover, in May 2008 a GMAC Relocation Trends survey also found that despite a slowing economy, 68% of MNCs continued to relocate employees at record levels (Deresky, 2011).

Need for the study:

In this rapid LPG Markets, a clear comprehension of the identities, background and overall well being of expatriates is necessary. Employees with updated management skills are becoming a critical competitive resource for international organizations (Olsen & Martins, 2009; Kraimer, et al, 2009). MNC managers should enhance discussion and communication between expatriates and their families to increase the exchange of views among family members to reduce conflict and disagreement arising from international assignments. Such an effective interpersonal relationships and coordination of expatriates with their families will be essential for their adjustment to an international assignments environment. This view suggests that sufficient communication between family members can reduce potential conflicts and enable expatriates to adapt and adjust to overseas life and work in order to perform effectively and efficiently (Wang, 2008). In addition, many other parameters related to work environment, culture, ethics and value system, behavioural issues at work can influence the performance of an employee. Indian IT employees are known for their work diversity and cross cultural issues at work with the wide spread work place movements in the career. A foreign country may be new to them in terms of language, demographics, environment and local customs. Hence, present study is conducted to know the issues and concerns of Indian expatriates. In addition, in the recent past the individuals are more willing to spare time with family and lot of uncertainty is prevailing on the social security and safety.

Factors influencing work performance of expatriates:

Many of the reasons for this failure were due to insufficient selection standards, issues of gender and race, substance abuse, and insufficient training of the expatriates (Minter, 2008). The family has been found to be the most important factor contributing to expatriate success or failure. For example, spouse/partner dissatisfaction has been reported as the top reason for international assignment failure (when defined as a premature return), particularly in dual-career households (Brown, 2008). Foster (1997) also noted that the influence of expatriate families on the employee's adjustment and assignment success is frequently accompanied by stress. An expatriate's assignment involves managing change, managing new experiences and managing challenges that result in stress. The sources of stress include relationship strains, unmet expectations and local pressures (Brown, 2008).

An expatriate who may have to deal with a very different way of life and an unfamiliar work environment unlike what he/she is accustomed to in the parent country becomes increasingly stressed out. Coping with stress could affect how well expatriates adjust and how well they feel about living and working abroad.

According to a 2008 survey by Just Landed, 68% German expatriates found the move abroad more difficult than expected, while only 8% found it easier than expected. Their biggest problems were adapting to the local culture (85%), finding new friends (72%), learning the local language (42%) and finding accommodation (38%). This study indicated how adjustments in job and life will directly affect an expatriate's employee performance.

According to the 2011 Global Relocation Trends Survey report from Brookfield GRS, there was a 61% increase in expat assignments in 2011 following a downturn the previous year that resulted from economic pressures. Moreover, the study highlighted the role of family dynamics in expatriate assignments and cited the top challenges as partner resistance (47%) and family adjustment (32%).

Review of Literature

An expatriate is an employee who is working and temporarily residing in a foreign country (Dowling, Welch, 2009). Some companies call such employees “international assignees”. To operate in an international environment, a human resource department must engage in a number of activities, which would not be necessary in a domestic environment (Dowling, Welch, 2009). Apart from the company supporting the expatriates during their assignments, the expatriate faces difficulties in terms of inability to adapt, difficulties with family adjustment in the new location, difficulties associated with different management styles, culture and language difficulties, issues associated with the accompanying partner’s career development. In cases where the potential candidates do not possess the requisite skills or abilities, MNCs need to develop a well-designed training that is administered before the individuals leave for their overseas assignment and then evaluated later to determine the overall effectiveness. People aren’t fired because they lack technical competence; they are fired because they can’t get along (Caudron, 1992). Hodgetts, Doh and Luthans (2006), states that training helps expat managers to understand the customs, cultures, and work habits of the local place. Jean McEnery and Gaston DesHarnais (1990) states that knowledge of the business practices in the relevant country, human relations skills and foreign language skills as the important skills required for an international assignment. Surprisingly, in their survey, respondents rated knowledge of the target culture as the least critical skill.

It has been observed that age of an expatriate could be a relevant factor in adjusting to a foreign location (Jan Selmer, Jakob Luring, Yunxia Feng, 2009). It is believed that as one gets older; satisfaction with monetary benefits becomes lesser while compared to other benefits. Family status is also the most important demographic variable in relation to cross-cultural assignments (Sims, Robert 2004). Despite the apparent importance of the family, less than half of MNCs interviewed the spouse in the expatriate selection process. Apart from career related issues, the spouse may experience high levels of stress due to disruption of children’s education and loss of self-identity. But, if the expatriate is travelling frequently, there is a possibility that the spouse may become habituated to exploring and adjusting in new places.

Another variable which can reduce the problems of expatriates is previous international experience. It is logical to assume that previous experience living overseas – especially in the same foreign county to which a person is currently assigned should facilitate adjustment, even though some culture shock will still occur (Black, Mendenhall, Oddou, 1991). According to Black (1999), previous international experience can help expatriate candidates know what to expect when relocating to a new country. It greatly reduces uncertainty and may help them to adjust better.

Despite several research insights on cross-cultural training and cultural shock, there are very few empirical researches linking age and monetary benefits, number of years of experience and pre-departure training, previous international experience and expatriate's work satisfaction and relationship between expatriates enjoying to travel abroad and ability of spouse to adjust.

Background of the Study

The conceptual definition of expatriates' as per the researcher in this study is 'any employee who is sent on company-initiated assignment to overseas location for a definite period of time, and returns back to India after his successful completion of the assignment'. The empirical study is intended to assess the expatriates' job related issues, family issues and cultural issues of the host country. The main objectives are further divided into sub-objectives and hypotheses are formulated. Review of literature provides detailed understanding of the problems faced by expatriates along with the resolution strategies. The researcher here tries to understand whether Indian expatriates' still face similar problems, in-spite of the organization taking measures to solve them.

Primary Objective

1. To understand the demographic profile of expatriates and its relationship with the issues in expatriation.

Methodology

The data was collected during Last quarter of 2014 and first quarter of 2015. Employees who had travelled on international assignments for a minimum period of three months to three years were considered as respondents for this study. The respondents were chosen by adopting snowball sampling technique. A total of 407 expatriates were contacted and 334 had responded for a response rate of 82 percent. Structured questionnaire along with semi-structured interviews were used for collecting data. The questionnaire consisted of demographic details of expatriates, followed by questions relating to job, motivational factors, socio and cultural issues of expatriates.

The questionnaire was formulated using a multiple options and 5 point likert scale. All the demographic aspects of expatriates were collected through multiple responses and the issues, concerns, motivators and the suggestions to overcome expatriates issues are collected through Likerts scale responses. Majority of the responses were collected personally as well as through email. Twenty six respondents were accepted to meet in person and to answer the semi-structured interview schedule. Appointments were fixed over telephone/mail and then the respondent was interviewed as per the convenience of the researcher and the respondent. During the interview the respondents was allowed to explain his own experiences and problems during expatriation leading to fewer questions from the researcher. This helped the

researcher to identify micro level difficulties of expatriates. The questionnaire tested for cronbach's alpha revealed 0.823, 0.811 and 0.824 on job-related, work related and socio culture related questions respectively. Descriptive statistics like percentage, correlation, ranking and inference statistics like chi-square, ANOVA and t-test were used to analyze data. Qualitative judgments were used to interpret data relating to semi-structured interviews.

Data Analysis and Interpretation

Table-I Personal Profile of the expatriates in the sample

Q.1	Gender	Frequency-(N)	Percentage-(%)
	Male	276	82.63
	Female	58	17.37
	Total	334	100.00
Q.2	Age Group belongs to	Frequency-(N)	Percentage-(%)
	Less than or =25 Years	38	11.38
	26-35 years	119	35.63
	36-45 years	104	31.14
	Above 46 years	73	21.86
	Total	334	100.00
Q.3	Level of Educational Qualification	Frequency-(N)	Percentage-(%)
	SSC or HSE or ITI	41	12.28
	Diploma	85	25.45
	UG	148	44.31
	PG	38	11.38
	Professional	22	6.59
	Total	334	100.00
Q.4	Level of Income per month	Frequency-(N)	Percentage-(%)
	Less than Rs.50,000	42	12.57
	Rs.50000-Rs.100000	139	41.62
	Rs.100001-Rs.150000	112	33.53
	Rs.150001-Rs.200000	28	8.38
	Above.Rs.200000	13	3.89
	Total	334	100.00
Q.5	Religion followed by your kind self	Frequency-(N)	Percentage-(%)
	Hindu	122	36.53
	Muslim/Islam	39	11.68
	Christianity	135	40.42
	Sindh/ Sikkism	24	7.19
	Others	14	4.19
	Total	334	100.00

Results of descriptive statistics revealed the following information. 82.63% were male and 17.37% were female in this study. A majority of the respondents belonged to the IT industry (computer, software, electronic and communication) industry. Also, most of the respondents belonged to the age group of 26-35 years. 61.98% were having less than 5 years of working experience, whereas, 20.36% had 6-10 years of working experience. 44.31 percentage of expatriates are under graduates with technical degree and 41.62 percent of them are getting a monthly package in terms of salary is Rs.50000 to Rs.100000. The major chunk of expats is Christians with 40.42 percent in the sample. This indicates the role of demographics in the expatriates management and issues in the expatriation. The lesser experience in both work and life requires proper guidance and counseling to mould them and to focus on work related aspects in the work place. This indicates the need for effective training and supervision at work place.

Table-II: Profile of work related aspects of the expatriates in the sample

Q.6 Nature of field in which working/worked	Frequency-(N)	Percentage-(%)
Engineering including IT	192	57.49
Science and Research& Development	38	11.38
Business, Finance and Management	48	14.37
Arts and Humanities, Law, Education	37	11.08
Medical and Paramedical	19	5.69
Total	334	100.00
Q.7 Level of management you joined	Frequency-(N)	Percentage-(%)
Shop floor level	186	55.69
Middle level	119	35.63
Strategic Level	29	8.68
Total	334	100.00
Q.8 Life time as expat (Experience)	Frequency-(N)	Percentage-(%)
1-5 years	207	61.98
6-10 years	68	20.36
11-15 years	34	10.18
16-20 years	16	4.79
Above 20 years	9	2.69
Total	334	100.00

It is noted from the results of the table II, that 57.49 percent of the expats are in the field of engineering and special focus to information technology and related industry and on contra only 5.69 percent are from medical and paramedical. Majority of the employees are hired (55.69 percent) are at shop floor level. It is also noted that, 61.98 percent of the employees opted for expatriation are having less than 5 years of experience. Further it is indicated that the young group of employees with very little

experience are in budding stage of the career and it requires lot of counseling and guidance to mould as a best professionals for the future needs of the organizations.

Table-III: Profile of the work place and the expatriate's relation to work place

Q.9	Experience in off-shore work	Frequency-(N)	Percentage-(%)
	No experience	193	57.78
	Different country experience	58	17.37
	Same country- place changed	83	24.85
	Total	334	100.00
Q.10	Work place Continent	Frequency-(N)	Percentage-(%)
	USA(America & Canada)	144	43.11
	UK(European Union)	39	11.68
	Australia	24	7.19
	South east Asia	19	5.69
	Middle East	60	17.96
	Africa	48	14.37
	Total	334	100.00
Q.11	Domain of Working	Frequency-(N)	Percentage-(%)
	Design and development	162	48.50
	Production/Construction	42	12.57
	Networking & Control	44	13.17
	Consulting	58	17.37
	Marketing	28	8.38
	Total	334	100.00
Q.12	Citizenship status	Frequency-(N)	Percentage-(%)
	Working /employment visa	228	68.26
	Tourist visa	89	26.65
	Green card holder	17	5.09
	Total	334	100.00
Q.13	Boarding, Lodging is taken care by	Frequency-(N)	Percentage-(%)
	Company sponsored	287	85.93
	Self sponsored	47	14.07
	Total	334	100.00
Q.14	Level of knowledge on Local language	Frequency-(N)	Percentage-(%)
	Don't speak	26	7.78
	Basic	42	12.57
	Satisfactory	92	27.54
	Good	134	40.12
	Good as mother tongue	40	11.98
	Total	334	100.00

The results of the table III, indicated that the employees opted for off-shore assignments are fresh and does not have foreign experience at all (57.78 percent of the sample). Major chunk of expatriation with 43.11 percent is to USA and Canada. 48.50 percent are in the field of design and development of engineering goods, software and IT applications and Mobile Apps, business packages, data packages. 68.26 percent are working on working visa provided by the company. 85.93 percent are company sponsored expats and the remaining only few percentage is self sponsored. 40.12 percent of the expats are having good level of knowledge on the local language and they can able to communicate with the local employees. IT is highly appreciable and positive aspect in the expatriation.

Table-IV: Level of agreement on the problems of the expatriates in the work place

S.No	Variables	Mean	Standard deviation	Rank
1	Cost of living	3.18	1.254	
2	Loneliness/Homesickness	3.18	1.254	
3	Cultural differences	3.29	1.256	V
4	Healthcare issues/Physical	3.05	1.409	
5	Relationship problems	3.28	1.422	VI
6	Irritation and hostility	3.12	1.352	
7	Adaption or bi-culturalism	3.31	1.182	III
8	Bureaucracy and employment	3.19	1.237	
9	Learning the local language	3.31	1.247	III
10	Finding a place to live	3.07	1.401	
11	Making new friends	3.27	1.422	VII
12	Sorting out finances and healthcare	3.14	1.344	
13	Finding a school for kids	3.34	1.175	I
14	Uncertainty	3.18	1.246	
15	Safety and security (terrorist activities)	3.30	1.248	IV
16	Civil riots against the government	3.09	1.398	
17	New culture and habits	3.29	1.418	V
18	Working conditions and work culture	3.12	1.348	
19	Food and appetite related issues	3.33	1.183	II
20	Society and Social interaction	3.17	1.243	
21	Proud off's and embarrassments	3.18	1.251	
22	Priorities and free time	3.08	1.372	
23	Nationality, religion and inheritance	3.17	1.212	
24	Likes and dislikes	3.12	1.346	
25	Adjustability with new environment	3.28	1.403	VI

SA-Strongly Agree, A-Agree, SWA-Somewhat agree, NA-Not Agree, NAAA-Not at all agree

The primary issues in the expatriation is identified are finding school for kids in the nearest location in case of married and going along with family, food and appetite related issues, adaptation of culture and local language, safety and security, cultural differences and habits, adjustability to new climate and environment, interpersonal relationships and making new friends and getting along are in the order of priority. This clearly indicates the need for socialization and adjustability with the new environment and people. Hence, work related issues are less when compared to others in the expatriation.

The other minor issues in the expatriation could be cost of living, home sickness, health care issues, hostility, beaureucracy at work, uncertainty, working culture and environment, society and social interaction, proud offs and embarrassments, priorities and free time nationality, religion, likes and dislikes, freedom to express. Over a period of time the minor issues can be managed with care. The basic steps of getting along needs to be taken care by the company in terms of guidance and nurturing. This can help is sorting out many issues in expatriation management.

Null Hypothesis: Ho:

There is no significant difference between male and female expatriates with regard to the perceptions on expatriate environment and culture prevailing, motivating factors of expatriation, problems of expatriates among the sample.

Table V: Showing the t-test results explaining the relationship between Marital status and dimensions of Expatriate issues among the Indian expatriates

Expatriate management dimensions	Marital status	Mean	Std. Deviation	t-value	p-value
Expatriate environment	Married	38.34	14.499	0.536	0.532
	Unmarried	39.24	14.875		NS
Motivating factors of expatriation	Married	66.58	10.928	0.170	0.865
	Unmarried	66.36	10.824		NS
Problems and issues of expatriates	Married	118.61	18.131	-0.448	0.658
	Unmarried	119.55	18.714		NS
Suggestions to improve the expatriate environment	Married	105.20	18.302	-0.286	0.775
	Unmarried	105.80	18.395		NS

Since p value is greater than 0.05, the null hypothesis, There is no significant difference between male and female expatriates with regard to the perceptions on expatriate environment and culture prevailing, motivating factors of expatriation, problems of expatriates among the sample is rejected at 5 % level of significance. Hence, it is concluded that, there is no significant difference between male and female expatriates with regard to the perceptions on expatriate environment and culture prevailing, motivating factors of expatriation, problems of expatriates among the

sample. It is noted that the perceptions of the male and female employees in the expatriation is same due to same work back ground and experience etc.

Null Hypothesis: Ho:

There is no relationship between experience as expat and perceptions on expatriate environment and culture prevailing, motivating factors of expatriation, problems of expatriates among the sample.

Table VI: Showing the group statistics of experience as expat and its relationship with the dimensions of expatriate management issues among Indian expats

Dimensions of Expatriate management		Experience in years				
		1- 5	6-10	11-15	16-20	Above 20
Expatriate environment	Mean	59.49	59.75	64.01	66.47	65.75
	SD	(15.83)	(13.32)	(8.44)	(9.69)	(8.52)
Motivating factors of expatriation	Mean	17.59	18.05	18.65	19.67	18.43
	SD	(4.31)	(3.43)	(3.11)	(3.32)	(4.13)
Problems and issues of expatriates	Mean	45.43	47.10	48.57	50.15	49.10
	SD	(8.33)	(7.27)	(4.34)	(6.14)	(6.17)
Suggestions to improve the expatriate climate and environment	Mean	44.51	45.34	47.74	49.51	50.52
	SD	(10.19)	(8.39)	(6.03)	(6.54)	(5.08)

Table VII: ANOVA results explaining the relationship between experience as expat and dimensions of expatriate management aspects among Indian expats

Dimensions of Expatriate management		Sum of Squares	Mean Square	F	Sig.
Expatriate environment	Between Groups	5251.992	1312.998	8.518	0.000**
	Within Groups	91718.967	154.150		
	Total	96970.958			
Motivating factors of expatriates	Between Groups	254.650	63.663	4.625	0.000**
	Within Groups	8190.535	13.766		
	Total	8445.185			
Issues and concerns of expatriates	Between Groups	1527.152	381.788	7.895	0.000**
	Within Groups	28774.181	48.360		
	Total	30301.333			
Suggestions to improve the expatriate environment	Between Groups	3128.534	782.134	12.335	0.000**
	Within Groups				

	Within Groups	37728.559	63.409		
	Total	40857.093			

Since p value is less than 0.01, the null hypothesis, There is no relationship between experience as expat and perceptions on expatriate environment and culture prevailing, motivating factors of expatriation, problems of expatriates among the sample is rejected at 1 % level of significance. Hence, it is concluded that, there is a highly significant relationship between experience as expat and perceptions on expatriate environment (F value 8.518 & P value 0.000) and culture prevailing, motivating factors of expatriation (with the F value of 4.625 and P value of 0.000), problems of expatriates (with the f value of 7.895 and p value of 0.000) among the sample.

Experience at work as a expat can help in learning many aspects of life and work related aspects. Hence, the perceptions of the experienced employees as expats can have close relationship with the various dimensions of expatriation in terms of positive perceptions towards expatriation. Hence, experience can help the employees to better understand the socio cultural dimensions of the society and the work culture in the off-shore environment. A constant management support to boost the employee morale and confidence with effective training and counseling the performance of the expat employees can boost to a greater extent.

Summary and conclusion:

Results of descriptive statistics revealed the following information. 82.63% were male and 17.37% were female in this study. A majority of the respondents belonged to the IT industry (computer, software, electronic and communication) industry. Also, most of the respondents belonged to the age group of 26-35 years. 61.98% were having less than 5 years of working experience, whereas, 20.36% had 6-10 years of working experience. The primary issues in the expatriation is identified are finding school for kids in the nearest location in case of married and going along with family, food and appetite related issues, adaptation of culture and local language, safety and security, cultural differences and habits, adjustability to new climate and environment, interpersonal relationships and making new friends and getting along are in the order of priority. The association between the marital status and the dimensions of issues in expatriation is found not significant and the relationship between the experience and the dimensions of expatriation issues is found as highly significant. Hence, it is concluded that socio demographic aspects are highly influencing in the expatriation issues among the sample. This can overcome through proper counseling and guidance to the expats.

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