

An Empirical investigation on key factors influencing successful Employee Expatriation Management

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Abstract

Employee assignments cost organisations a multiple of local employees and can add value if successful, but up to 40% of international assignments fail. This study examines the factors that have a positive impact on the expatriate process and the role Lewin's three-phase model of change plays in supporting the organisation. The methodological approach includes a qualitative data analysis of ten interviews with expatriates. These showed that the factors of administrative and logistical support, training, mentoring, family support (if required) and career planning have the strongest influence and should be offered by the organisation.

Lewin's model helps to understand the change process that the expatriate is going through and to support him or her. The main limitation is the small sample size and the lack of transferability to other countries and cultures. For future research direction, the results should be verified using quantitative methods and be tested in practice.

Keywords: Expatriation, employee assignments, key factors.

Introduction

The research question addressed in this study refers to which influencing factors an organisation should consider to achieve a successful expatriation process for the employee and the organisation.

The number of multinational corporations (MNCs) has increased dramatically in recent decades. While there were about 7,000 parent companies in 1970, this number has already risen to 82,000 in 2008. In 2014, these parent companies included more than 230,000 foreign affiliates. Unfortunately, there are no validated evaluations for the current figures, but the trend continues to rise. At the global level, MNCs are responsible for about 33% of global output, half of global exports and a quarter of overall employment. These figures illustrate how important MNCs are to our economy.⁴⁴ It is estimated that these companies currently have almost one million of their employees posted to foreign countries, numbers rising.¹⁵

The most common reasons for international assignments include entering new markets, managing foreign subsidiaries

and transferring skills and know-how. For these mentioned motives, the number of expatriates is expected to continue to increase in the future.³ This trend, which is particularly caused and reinforced by globalisation and internationalisation, confronts companies with new challenges. Employee expatriation, if successful, can lead to competitive advantages,⁵⁷ but there are high costs associated for the organisation.⁵⁹

It is estimated that the purely financial costs for an expatriate are about three times higher than for employees in comparable local positions.^{43,69} The expenses can include salary, training, relocation and family support.^{8,30} Financial losses can be compounded by the loss of the employee's know-how, negative reputation and thus difficulties in future recruitment⁴² and poorer performance of the employee.⁴³ Furthermore, a failure can influence the employee's future career negatively and can lead to reduced self-confidence, motivation and a bad reputation, which may diminish the chances of a further assignment.¹⁷

Depending on the study, employee assignments result in failure in about 40% of the cases. This includes the premature return of the employee as well as poor performance and the employee leaving the company in the first years after returning. A 2016 survey found that 38% of expatriates leave their company within one year of returning,² while another survey found that about 11% end their stay abroad prematurely.¹² To reduce the failure rate of international assignments and thus save costs and resources, it is essential for MNCs to know which factors have a particular influence on successful employee expatriation and to integrate these into the expatriate management process.

The overall objective of this research is to identify key factors influencing the successful expatriate process. First, an extensive literature research will form the basis for the definition of the expatriate process and the interpretation of success. The research will be based primarily on literature from the last five to a maximum of ten years to reflect the current state of scientific knowledge. In addition to the definitions mentioned, the aim of the research is also to identify significant factors influencing the expatriation process. Based on previous studies, at least the three most significant influencing factors for each phase of the expatriate process will be identified.

Second essential objective of this work is to link Lewin's change process with the expatriate process in its three phases. The chapter of the theoretical foundation will conclude with a model of how the three phases of the

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expatriate process can be reconciled and harmonised with those of the change process. If such a link can be established, it may provide new indications for dealing with expatriation processes in practice as well as in the literature. With the help of qualitative interviews conducted with expatriates, the identified factors will be challenged and considered as a whole in relation to the overall process. The aim of these interviews is to be able to give several recommendations for action in practice.

On the one hand, which factors companies should pay particular attention to in the individual phases to be able to design the expatriate process successfully and, on the other hand, which factors have the greatest influence on the success of the expatriation when considering the process as a whole. The recommendations for action are intended to help organisations to make their expatriation process as successful as possible, so that a higher success rate can be achieved and costs associated with the failure of the process can be reduced.

By achieving the above objectives, two research gaps in the literature can be filled. In the past, many studies have looked at specific factors in the expatriate process or focused on certain phases. Either a specific phase is in the foreground and individual measures of the organisation and the effects are examined - predominantly this is the phase of repatriation - or the effect of individual measures on the expatriate and his or her behaviour is examined - a frequent example is adaptability in the host country. However, there is currently no scientific work that comprehensively looks at the entire process and the various possible influencing factors. Furthermore, at this stage there is hardly any study that examines the impact of the typical measures taken by the organisations to support their employees on the expatriate's satisfaction, this also stems from how the success of the expatriation process is defined in most cases.

By referring to the whole process as well as the individual phases of the expatriation process and the underlying definition of success, these very research gaps are addressed. Furthermore, during the literature search, no scientific work could be found that attempted to link the phases of the expatriation process with those of Lewin's change model and thus gain new insights and recommendations for dealing with them within the organisation. This study aims to reduce this research gap and add initial insights.

Theoretical Foundation

In most of literature that can be found on the topic of expatriate management, neither the term expatriate nor expatriate management is properly defined. McNulty et al³⁹ also states that "there is a lack of consensus as to how expatriates should be defined". In contemporary studies, the term not only refers to workers sent abroad by their company, but also to other forms of international experience such as students, self-initiated workers abroad and migrants. Here, permanent employment with a company is not always

a prerequisite for being an expatriate.³⁹ Nevertheless, a large part of the definitions refers to persons who are classified as expatriates by a company and thus assume employment with that company. While Aycan and Kanungo¹ have linked the term expatriate to a duration of stay of six months to five years, Harrison et al¹⁸ do not define the duration of stay, but do require it to be fixed and limited in time. Finally, McNulty and Brewster³⁹ understand a length of stay of one month or more as sufficient for the term expatriate and do not set an upper limit.

In contrast, Tan and Mahoney⁶⁷ cite a posting duration of three to five years. There is agreement, however, that the posting is linked to a specific task or objective. There is also an understanding that the expatriate is a non-national in the host country.^{1,18,39,61} For this study, expatriates are defined as employees of an organisation that are sent temporarily to a foreign country, that they have non-citizenship for, in order to accomplish a set assignment. These assignments typically range in a length between three month and five years.

Therefore, expatriate management includes all processes of the company that are related to the international assignment of employees. This includes, among other things, all tasks of employee selection, preparation, training, support during the assignment and repatriation of the employee in the home country. Expatriate management is usually integrated in the international human resources management of an organisation.^{17,56} While the expatriate management process is always mentioned in the literature and various articles, it is hardly ever defined.^{8,32,43,46,66,74}

Basically, it maps the activities of expatriate management in the required order and subdivision. Each company develops its own individual process for the expatriation of employees.⁶⁶ For the purposes of this study, the expatriate management process is divided into three main phases: The first phase includes the selection and preparation of expatriates for their assignment. This phase takes place in the home country.^{61,74} The second phase is the international assignment.^{46,61} And the third phase is the so-called repatriation. This is the phase that follows the stay abroad and in which the employee returns to his or her organisation in the home country.^{43,66} The second and third phases overlap in time, as preparations for the return to the home country can already take place during the stay abroad.

The first phase, the preparation of the expatriate for the stay abroad, typically begins with the selection process.^{61,66} Once it has been decided which employee is to be sent, he or she can be offered various pre-departure trainings. These typically include language training and cross-cultural training.^{46,57,59,61}

During the preparation phase, the family of the expatriate can also be prepared for the stay and can take part in different trainings.^{17,46} Furthermore, in the case of long-term assignments, the company can also integrate logistical

support into the process and can assist in finding accommodation and applying for travel documents and schooling for family members.^{46,57}

In order to support the expatriate during the second phase in adapting to his or her new environment and position, further training can be offered locally.^{8,59,74} In addition, there can be mentoring programs that provide the expatriate with a contact person both locally and in the home country.^{43,57,61} In most of companies, the international assignment phase also includes performance management to control and measure the expatriate's progress and performance.^{57,61,74} The last phase is often considered the most critical phase of the expatriate process and includes all the activities regarding the employee's return.⁴³

Depending on the design of the process, a repatriation agreement can be arranged with the employee and a career development plan can be prepared which includes the job placement in the home country. Re-entry training can also take place before the departure from the host country to prevent a reverse cultural shock of the expatriate. In cases where the expatriate and his or her family return to their home country, re-integration programs and workshops can be organised.^{8,32,61} Similar to the integration into the host company, a mentor can also be assigned to the employee upon return, who is available as a contact person.⁴³ As expatriates return to their home country with a changed know-how, the process concludes with passing on the newly learned knowledge in the home country. Therefore, knowledge seeking and transfer sessions can also be part of the expatriate management process.³²

To be able to conclude at the end of the expatriate management process whether it is a success or a failure, it is important to define what constitutes a successful international assignment. In most literature and studies, failure is understood as the early return of the expatriate to the home country. Accordingly, an assignment is considered successful if the expatriate works abroad for the designated time and thereafter returns.¹³ Some articles add repatriation to this definition i.e. the reintegration of the employee in the company.⁷⁷ Academic articles that go beyond these two factors usually cite the employee's performance as a criterion for success as well as his or her adaptation to the host country and culture.^{74,79}

While the expatriate's performance is undoubtedly a criterion of success for the company, Guttormsen et al¹⁶ argue that the concept of failure and success has so far been developed and used without the input of expatriates. Their survey found that expatriates rarely consider assignment termination or low performance as failure, but rather relate it to their own well-being and the expatriate experience itself. Furthermore, Pinto et al⁴⁹ found that the employee's satisfaction with his job and the foreign assignment have a significant impact on the expatriate's intention to leave. Since this study focuses on the success of employee

expatriation from the perspective of both the company and the expatriates, the following definition will be used: "The success of expatriation is measured on the one hand by repatriation i.e. whether the employee returns to the parent company and can be retained there. On the other hand, it is measured by the two factors of employee performance and satisfaction during the three phases of the expatriate management process."

Various studies have shown that perceived organisational support has a significant influence on the success of the expatriate process. The higher is the perceived organisational support, the more satisfied the expatriates felt and the better was their performance.^{58,72} Therefore, the question is not whether a company should support its employees in the expatriation process, but how and which factors have the greatest influence. In the preparation phase, the company can support its employees through various activities. The first phase, preparation, often includes the selection of the employee.

However, the selection will be disregarded, as it is about the supporting influencing factors that the company makes available to its employee as soon as the expatriation process starts. In this case, the selection of the employee to be sent is not considered part of the process in which potential influencing factors specifically affect the expatriate and is therefore not considered. One of the possibilities that have already been frequently examined in the literature is various types of pre-departure training. The results show that companies should offer such training in any case, but that this is often only offered sporadically or not at all for cost reasons.⁶¹

Sher et al⁵⁸ advocate, among other things, communication training to prepare the expatriate for his or her role in the foreign location. Furthermore, cross-cultural training plays an important role in accelerating the adaptation of expatriates to the new culture and thus increasing performance and satisfaction.^{47,65,69} Other types of pre-departure training can include language courses and offers for the employee's family, if they accompany the employee abroad.^{54,61,69,78} Research by Webber and Vögel⁷⁵ has shown that companies often do not offer such training to the extent expected and desired by the employee. Moving on, mentoring is a controversial influencing factor.

Here, the employee is provided with a mentor who is available as a contact person for questions and support during the preparation phase. This mentor should have already gained experience abroad in order to be able to support the employee in the best possible way.⁶¹ While some results show a positive influence on the progression and successful completion of the expatriate process,^{42,61} other studies show mixed results. For example, the study by Paik et al⁴⁷ showed that expatriates do not always consider a mentor to be necessary.

Another factor influencing the expatriate's satisfaction and performance, as well as the entire process, is the logistical and administrative support the expatriate receives. Studies have shown that the company's support in relocating, finding accommodation and applying for papers such as a visa or work permit can reduce the employee's stress so that he or she can continue to perform well in the preparation phase.^{8,32,75}

During the international assignment, there are several factors that have been identified as major influencing factors in past studies. Just as in the preparation phase, the mentoring factor is controversial. During the stay abroad, the expatriate may be assigned a mentor from the host country who is responsible for the expatriate. While Naude and Vogel,⁴² for example, see a positive influence on the success of the expatriate process, other research has not confirmed this statement.^{47,72} On the other hand, maintaining and regularly communicating with the parent company is considered essential for success.^{42,47} This also has positive effects in the repatriation phase, as the expatriate remains informed about changes in the home country and thus does not feel excluded.⁴²

At the same time, the support of the supervisor can also have a positive influence on the expatriate's performance and satisfaction. The supervisor can be based either in the home or host country. A good relationship between the expatriate and his or her supervisor, as well as the supervisor's support, is important for a positive impact on the process.^{31,61,72}

Another is the provision of further training for the expatriate in the host country. Results show that post-arrival training accelerates the adaptation speed to the host country and thus increases the expatriate's satisfaction and performance, as integration takes place more quickly.^{58,75} Furthermore, studies have shown that many expatriates end their stay abroad prematurely due to family problems. If the expatriate is accompanied by his or her family, support for the family can significantly increase the chances of success. This includes cross-cultural and language training as well as support in the search for a school and tutoring for the children or the partner's job search.^{61,69,75}

The last phase, repatriation, begins, before the expatriate's actual return. Various studies show that it is important for success to show the expatriate what to expect in the home country and thus to create realistic expectations. This includes giving the expatriate planning security by discussing and recording the career options and the future position before the return.^{42,60,65} This is essential to prevent the expatriate from leaving for another company at short notice. Most expatriates expect their return to be associated with career advancement, so growth opportunities must be clearly identified and discussed. If the expatriate is unable to grow, this will have a negative impact on their satisfaction.^{32,60,79} Following on from this, it is equally important to show the expatriate that his or her acquired

know-how and experience are valued and used by the company.

If a new position is found together with the expatriate that considers the new skills and experience, this has a great influence on satisfaction and performance.^{42,65} Progressing to another factor, counselling sessions have a positive impact on the repatriation process, especially in terms of avoiding reverse cultural shock and making the return process as pleasant as possible for the expatriate. In order to achieve the best effect, counselling sessions should be offered both during the assignment and back in the home country to address the needs of the employee and to alleviate his or her fears and worries.^{8,32,42}

Like the preparation phase, the logistical support of the company also has a positive influence on the success of the expatriate process in the repatriation phase. By supporting and organising the move back to the home country, the expatriate's stress can be reduced so that overall satisfaction is higher and performance is improved due to fewer parallel tasks.^{8,32,61}

Nothing is as constant as change. A phrase you hear quite often these days. In order to adapt to this change and, in the best case, to use it to its advantage, almost every company is concerned with change management. A change in general describes the transition from one state A to another state B. It is not specified whether state B is better or worse than the initial state A.

However, in a business context and literature, change management usually assumes that state B is better than state A or at least the more desirable state.²⁶ However, change management does not refer to a precise definition of the desired goal, but to the way to achieve it. It refers to the individuals who are undergoing the change. This is because any company that wants to change and adapt needs the support and commitment of its employees, as change starts with the smallest unit.^{7,62} In many definitions, change management is described as an ongoing process, as a company is constantly exposed to new influences, both external and internal.^{62,68,71} It includes all the activities needed to create acceptance for the change needed or wanted and thus to be able to implement the change.⁶³ It should be noted that change processes are by no means quick measures and implementations, but instead invariably involve a considerable amount of time.²⁶

In the field of change management, Lewin²⁹ is one of the scientists who have had an enormous influence. With his findings, Lewin created an ethical and humanistic approach to change that sees learning and participation as an essential part of change. Even though today his three-phase model is seen in the context of organisational change, Lewin²⁹ developed it against the background of achieving sustainable change in group, organisational and social structures. Lewin's three-phase model includes the following three

phases: unfreezing, moving and refreezing. The aim of the model is, for example, to move a group from the current, undesirable level to a desired level. The difference between the two levels is the change.

For this, Lewin²⁹ sees it as necessary to break or unfreeze the previous habits. Without breaking previous habits, it is not possible to achieve change. The second phase of moving follows as soon as the previous habits are unfrozen. It is difficult to predict in which direction the movement will take place. Therefore, learning and involvement are of particular importance to achieve an alignment with the desired level. The final phase of the change process is refreezing at the desired level that has been reached. This is essential because without this step the change will not last and people will fall back into old habits. It serves to stabilise the new state and thus a sustainable and successful change.²⁹

Lewin's model is repeatedly criticised and at the same time defended by many researchers. A frequent point of criticism is the apparent simplicity of the model. For example, Kanter et al²² claim that Lewin's three phases are a linear and static concept and Child⁹ criticises that the model lacks the flexibility needed in today's complex and ever-changing world. It is also criticised that the linearity of the model does not and cannot consider feedback during the process.⁵³

Orlikowski and Hofman⁴⁵ feel that Lewin sees change as a single event that can be managed in a limited time. Although Cummings et al¹¹ go so far as to claim that Lewin²⁹ did not develop the three-phase model, but that it was formed and attributed to him after his death, they defend him in the above criticisms. They show that Lewin never presented his model in the form of a linear diagram or an enumeration and always assumed that groups are never in a static state but are constantly moving and changing. Nevertheless, Lewin²⁹ believed that in group dynamics there are phases of relative stability.

Considering his older works, it can be seen that these form the basis for his three-phase model. On the one hand, this refutes Cumming et al statement that Lewin²⁹ did not develop the model and on the other hand, it is clear from his theory of action research that his three-phase model is also an iterative process in which feedback is received and processed.⁶

Lewin's model of change in three phases is now firmly anchored in the field of change management. It forms the basis for further theories. Other theories of change management can be broken down to Lewin's three phases⁶. Levasseur²⁸ even goes so far as to call Lewin's²⁹ model the most powerful tool that can be applied in the field of change management.

In setting up his three-phase model of change, Lewin highlighted several points that are important for successful change. One essential influencing factor is group dynamics.²⁹ For change to take place, the active participation of the group and each individual affected is of particular importance. Active participation is essential in all three phases, as it helps to break old habits, to acquire and learn new behaviour and to stabilise it through repetition.²⁸ If change is to be brought about, the force of change must be stronger than the resistance of maintaining the status quo to set a group in motion. The lower is the threshold of resistance, the easier it is to trigger the movement.⁶

A second essential factor in this context is the voluntariness and democracy of the group. For a change to be sustainable, the group and its members must decide on their own to go along with the change and it must be a democratic decision. If the change is imposed and the need for change is not recognised, it will be very difficult to stabilise it and introduce it as a new status quo, because the commitment of the group is missing.^{6,29}

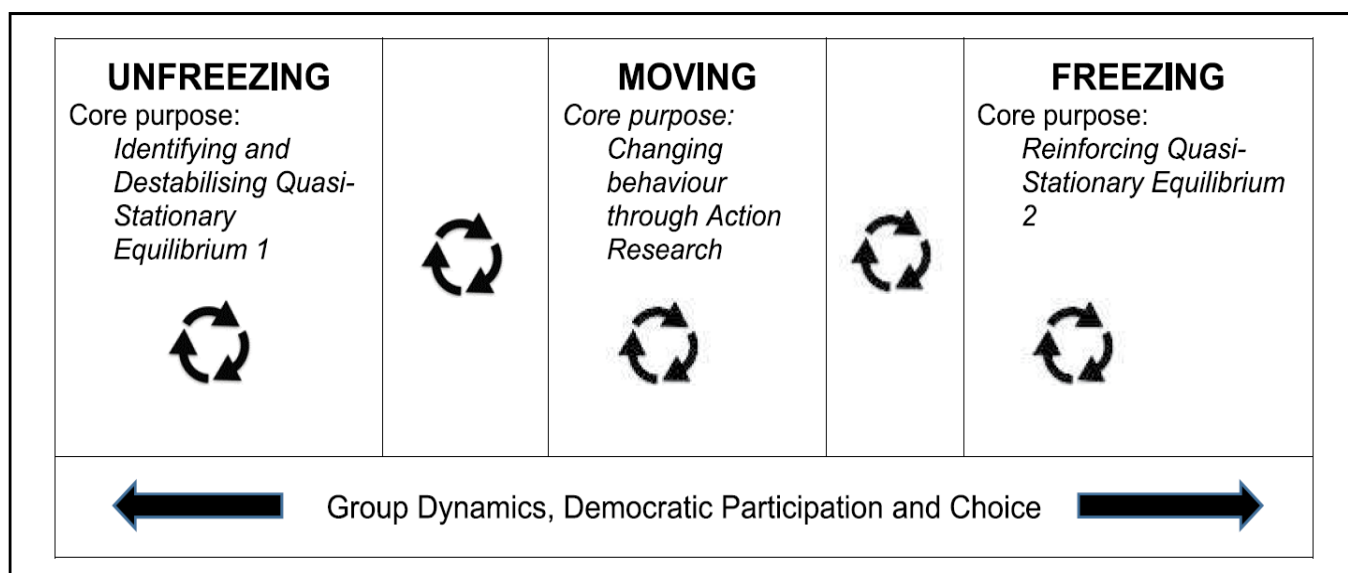


Figure 1: Field theory-based view of Lewin's²⁹ three-phase model by Burnes⁶

It is not difficult to link Lewin's²⁹ model to the three phases of expatriate management. Due to the division already made, a connection of the three phases in their order is obvious. Thus, Lewin's model should be considered in the three phases of expatriate management and treating the expatriate assignment as a change that needs to be managed can contribute to success. Accordingly, the first phase of expatriate management, preparation, can be equated with Lewin's first phase, unfreezing. The phase of the international assignment corresponds to moving and repatriation and the return to the organisation in the home country are equated with the refreezing phase as the final step of the process.

Why a model that is nowadays primarily used for organisational change, should also apply to an individual employee, can be understood from the basics and background of Lewin's model.²⁹ Considering his scientific development, his three-phase model of change can be seen as a method that tries to understand the complexity of human behaviour and how it is changed.⁶ In addition, in the article in which he first explicitly describes the three-phase model, Lewin²⁹ did not address organisational change, but related the model to changes in social structures.²⁹ Even if his model is seen today as the basis of organisational change, it is not limited to this subject area alone.

The phase of unfreezing is described by Lewin²⁹ as a phase in which stability is broken. Familiar structures are disrupted and change is imminent. Lewin sees this phase as challenging and a process of re-learning and re-thinking which gives those affected an advantage in future change processes, as they can learn from this experience.⁶ In the expatriate management process, this corresponds to the preparation phase. The expatriate is about to embark on a foreign assignment and a fundamental change in his or her daily work and life. In order to prepare the employee for this, various trainings are conducted that encourage the employee to rethink.⁵⁷ In the expatriate process, the phase of unfreezing is artificially triggered, but still has the same characteristics as those attributed by Lewin.²⁹ Lewin's second phase, moving, describes the actual change.

Lewin²⁹ sees it as a pre-requisite that the forces that bring about change are stronger than those that want to maintain the status quo and resist change. It is uncertain where exactly the change is directed.²⁹ This undirected change can be unequivocally attributed to the international assignment. The employee who lives in a different country, is exposed to a different culture and is surrounded by foreign people, is exposed to great forces that hardly allow him to maintain his habits. In this phase, the employee goes through many influences that affect him to varying degrees and make him or her undergo change.⁴³

It is an assimilation to the host culture in the form of food and customs or through new information and impressions that they experience in their daily work. The last phase,

freezing, is described by Lewin²⁹ as the most difficult phase, since it only occurs if regression can be prevented. In this last phase, the change should be stabilised i.e. should become a new normal. The newly learned behaviour must be reinforced and encouraged to replace the old habits. If this phase does not succeed in being free of repression, the affected person will fall back into old patterns after a short time and will not reach a higher level than the previous one through the change.⁶ The same applies to the repatriation of the expatriate. The aim of this phase is to use the employee's know-how and knowledge and all the newly acquired skills for the company in the home country. For this, it is necessary that the employee is challenged and encouraged to maintain and use his newly achieved level i.e. his personal improvement and enrichment.⁴²

In Lewin's²⁹ model, the main influencing factor needed for a successful change process is group dynamics. He describes that to achieve a freeze, the group must democratically decide to do so. Furthermore, the norms and habits of the group members are particularly important. As a whole the behaviour of each individual will also change.^{6,52} Consequently, it is almost impossible for an expatriate who comes to a new environment and a new group to avoid change during his stay abroad.

This is due to the fact that the expatriate's new group is likely to have different habits and norms. The factors influencing the second and third phases of the expatriate process also confirm the influence of the group and active participation. Thus, regular communication as well as further training during the expatriate assignment were identified as important influencing factors during the expatriate assignment.^{42,47,58,61} Another factor that the company itself cannot influence is the interaction with the host country nationals i.e. the new group that surrounds the expatriate.⁷⁴ On return, the most important factor is the joint development of the further career path and the possibility of passing on what has been learned.^{32,42,43,60,65}

This refers especially to sustainable change and the possibility of freezing and stabilising change. These factors only exemplify the role of the expatriate's active participation, as also described in Lewin's model.²⁹ Although not explicitly mentioned by Lewin,²⁹ there are also parallels between the first phases, the unfreeze and the preparation in the expatriate process. In change management, it is generally emphasised that a vision should be made clear at the beginning of a planned change and that the employees should be prepared for this in the best possible way.⁵² This coincides very well with the preparation phase of the expatriate process, as the employee is prepared for his or her assignment abroad through various trainings and preparatory activities.^{47,58,69}

In change management, close support and guidance through the change process are also presented as important success factors.⁵² This is also reflected in expatriate management, as

the role of the mentor and the supervisor in particular have an influence on success.^{32,61,72,74,75}

In conclusion, it can be said that Lewin's model of change in three phases can be applied to the expatriate management process and that the phases can be equated.

Based on the results presented above, it can be shown that Lewin's model of change can also be applied to the process of employee expatriation and shows great parallels. Furthermore, the literature research has shown that there are hardly any considerations of the overall process and relevant success factors at the present time. Based on the information gathered, it can be assumed that the individual influencing factors have varying degrees of importance in the expatriation process.

Nevertheless, everything indicates that they have a considerable influence on the overall success of the expatriate process and should therefore be given greater attention by organisations. Furthermore, the personal satisfaction of the employee is considered an essential criterion to ensure the sustainable success of the expatriate management process. Therefore, the following basic assumptions are formulated:

Assumption 1: Certain forms of organisational support have positive effects on the success of the expatriate process.

Assumption 2: The expatriate's satisfaction is more important for the sustainable success of the expatriate process than performance, as satisfaction influences performance.

Assumption 3: The main factors influencing the success of the expatriate process are in line with Lewin's²⁹ model of change in three phases.

Methodology

The 'research onion' by Saunders et al⁵⁵ was used to justify and develop the research direction and the survey instrument

of the proposed study. For the purposes of this study, the research philosophy of pragmatism is considered appropriate. This philosophy assumes a complex, external reality that is the practical consequence of ideas. Furthermore, we will primarily work with deduction and partly with induction. This has the following reasons: Within the framework of the deductive approach, hypotheses are formulated on the basis of existing literature and then tested. This procedure is useful for identifying initial factors that may have an influence on the success of the expatriate process and then falsifying or verifying them with the help of the chosen method.⁴

However, the deductive method can only be used to test what has already been identified in the literature in the past. In order to obtain a holistic picture and possible further influencing factors, the deductive procedure is supplemented with the inductive approach. This enables the inclusion of further factors within the framework of the method application and the generation of new theories.⁵⁵

In the context of this work, a mono-method qualitative study will be conducted. This is particularly due to the research question. Normally, semi-structured or unstructured survey methods are used in qualitative data collection. Among other things, this enables an inductive approach. At the same time, a deductive approach is not excluded by a qualitative approach.⁵⁵ In the context of this work, this makes it possible to test influencing factors already identified in the literature research as well as to add new ones and thus generate new theories.

In the latter case, the focus is not on measurement accuracy, but on the appropriateness of the subject matter, as a qualitative method supports the research question better than a quantitative one. In further research, the findings of this work can be tested and generalised with the help of a quantitative method.³³



Figure 2: Connection between Lewin²⁹ and the Expatriate Process

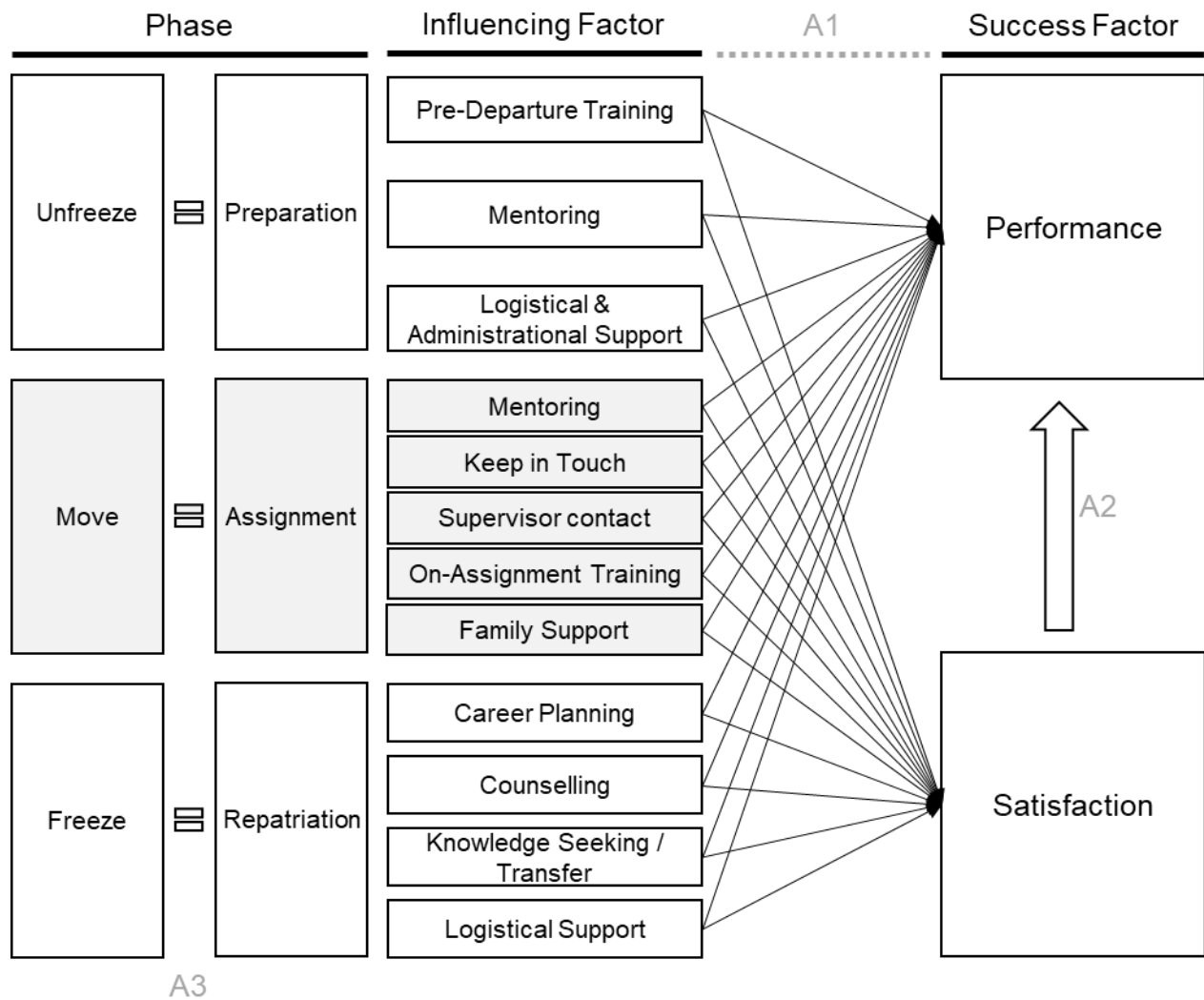


Figure 3: Research Framework

For the presented work, a cross-sectional study was chosen as a temporal horizon. The reason for this is that a cross-sectional approach examines a specific phenomenon at a specific point in time.⁵⁵ It is assumed that the factors influencing a successful expatriate process change only very slowly and that a certain continuity is given. The qualitative interview is chosen as the specific method of qualitative data collection in this work. A semi-structured guided interview will be used. This form of interview is used to generate specific information on factors influencing employee expatriation that would not be available using other methods.^{14,20} For this work it was decided to conduct the interviews as one-on-one interviews. Some of the interviews are conducted in person while others take place over the phone.

This is due to the fact that the participants come from different regions and thus a face-to-face interview cannot always take place. Although it is considered an advantage of a personal interview that a relationship of trust can be built up between the researcher and the participant and that the reactions of the participant can be better addressed.²⁵ The telephone interview also has advantages. The interviews are

not tied to a specific location and allow the participant to visit an environment in which he or she feels comfortable and undisturbed. In addition, it has already been studied that a more anonymous atmosphere can also contribute to the participant answering more openly and disclosing more information.⁵⁵ When conducting interviews, various influences must be considered that can lead to certain forms of bias.

The interviews are conducted with ten former expatriates from different organisations and sectors. It is important that the expatriates fulfil the previously formulated definition. Accordingly, they were all sent to a foreign country by their employer for at least three months. The minimum length of stay in the host country plays a decisive role, since if the duration is too short, the influencing factors become less important, as the change is not significant for the employee. As this is a convenient sample,^{33,41} all participants have Germany as their home country. The participants were selected because they have all gone through the expatriate process in their respective organisations and can therefore provide insights into the effectiveness of the influencing factors for a successful process.

In particular, the effects on satisfaction and perceived personal performance are questioned. The interview participants received a summary of the topic as well as the planned procedure at the same time as the invitation two months before the interview to be able to prepare themselves and assess whether they are suitable as interview participants.

This has the advantage that the participants can prepare themselves in advance, as in some cases the individual phases of the expatriate process already lie several years in the past. The interviews, which are conducted in person or by telephone, are audio-recorded. The language of the interviews will depend on the preferences of the participants and will be English or German.

Furthermore, the interview duration should be approximately 30 minutes. To be able to evaluate the interviews, the audio-recorded interviews are first transcribed. In case the interviewee refuses the audio recording of the interview, notes are taken during the interviews and these are worked up in the form of memory protocols.

The interview guide was developed based on the previously conducted literature research. It is structured according to the three phases of the expatriate process. In addition, the last topic deals with the overall process and possible influencing factors. Within each topic, individual influencing factors identified from theory are asked about their impact on the expatriate's satisfaction and perceived performance. These questions form the deductive part of the interview.

In addition, the participants are given the opportunity to name other relevant influencing factors. These questions form the inductive part of the interview and enable the generation of new theories. The conduction and evaluation of the interviews should meet the requirements of research ethics.⁵⁵ Accordingly, all participants take part in the interviews voluntarily and are informed that they may withdraw their participation at any time. Furthermore, a declaration of consent is obtained from each participant that the information collected may be processed, used and published in the context of this work. Personal data will be treated confidentially and the anonymity of the participants will be ensured.

Interview guide

General questions

1. How old were you at the time of expatriation?
2. Were you accompanied abroad by your partner/family?
3. From which company / industry were you sent abroad?
4. How long was your stay abroad?
5. Did you break off your stay abroad/return early?
6. Did you leave your organisation within the first 2 years of returning?

Topic 1: Preparation

1. Pre-Departure Training

- a. Did your company offer you training - for example language training or cross-cultural training - before your departure?

Yes

- b. What kind of training did you receive?
- c. In what ways has the training affected your satisfaction?
- d. Have you noticed any impact on your performance? What kind of impact?

No

- e. What form of training would you have liked?
- f. How do you think such training would have affected your satisfaction?
- g. What impact on your performance would you expect such training to have?

2. Mentoring

- a. Did you get assigned a mentor before you were sent abroad?

Yes

- b. What form did the mentoring take? Mentor in home country or host country? What was the mentor's contact person for?

- c. In what ways has mentoring impacted your satisfaction?
- d. Have you noticed any impact on your performance? What kind of impact?

No

- e. What form of mentoring would you have liked? (Colleague who is a former expat or already a mentor in the host country etc.).
- f. How do you think mentoring like this would have affected your satisfaction?
- g. What impact on your performance would you have expected mentoring to have?

3. Logistical and administrative support

- a. Did you receive logistical or administrative support from your company before departure? (Moving, finding an apartment, applying for travel documents etc.)

Yes

- b. What support did you receive?
- c. In what ways has the support affected your satisfaction?
- d. Have you noticed any impact on your performance? What kind of impact?

No

- e. What form of logistical or administrative support would you have liked?
- f. How do you think such support would have affected your satisfaction?
- g. What impact on your performance would you have expected from the support?

4. Other influencing factors

- a. Are there other factors that, in your experience, have a positive impact on your satisfaction and performance? What do you wish you had done to feel better prepared?

Topic 2: Assignment**1. Mentor**

a. Have you been assigned a mentor for your international assignment?

Yes

b. What form did the mentoring take? Mentor in home country or host country?

c. In what ways has mentoring impacted your satisfaction?

d. Have you noticed any impact on your performance? What kind of impact?

No

e. What form of mentoring would you have liked? (Colleague who is a former expat or already a mentor in the host country etc.).

f. How do you think mentoring like this would have affected your satisfaction?

g. What impact on your performance would you have expected mentoring to have?

2. Keep in touch

a. Was there an offer to get regular updates from the home and parent company?

Yes

b. In what form did the offer take place?

c. In what ways has Keep in Touch affected your satisfaction?

d. Have you noticed any impact on your performance? What kind of impact?

No

e. What form of Keep in Touch would you have liked?

f. How do you think such a format would have affected your satisfaction?

g. What impact on your performance would you have expected from a Keep in Touch format?

3. Supervisor

a. Did you have a good contact with your supervisor during your stay abroad?

Yes

b. Which supervisor did you have contact with? (Home / Host country?)

c. In what way did the contact with your supervisor affect your satisfaction?

d. Have you noticed any impact on your performance? What kind of impact?

No

e. What form of contact with your supervisor would you have liked? (home/host country)

f. How do you think such a relationship would have affected your happiness?

g. What influence on your performance would you have expected from a good contact with your supervisor?

4. Training

a. Did your company offer you training - for example language training or cross-cultural training - during your stay abroad?

Yes

b. What kind of training did you receive?

c. In what ways has the training affected your satisfaction?

d. Have you noticed any impact on your performance? What kind of impact?

No

e. What form of training would you have liked?

f. How do you think such training would have affected your satisfaction?

g. What impact on your performance would you expect such training to have?

5. Family support

a. Have you been offered support from your company for your family? (Training for family, school search, job search)

Yes

b. What kind of support did you receive?

c. In what ways has the support affected your satisfaction?

d. Have you noticed any impact on your performance? What kind of impact?

No

e. What form of support would you have liked?

f. How do you think such support would have affected your satisfaction?

g. What impact on your performance would you have expected from a support?

6. Other influencing factors

a. Are there other factors that in your experience, have a positive impact on your satisfaction and performance? What would you have liked to see in order to better fulfil your assignment?

Topic 3: Repatriation**1. Career Planning**

1. Have you been offered any kind of career planning or development planning by your company?

Yes

b. In what form did you receive career / development planning?

c. In what ways has planning affected your satisfaction?

d. Have you noticed any impact on your performance? What kind of impact?

No

e. What form of career / development planning would you have liked?

f. How do you think such planning would have affected your satisfaction?

g. What impact on your performance would you have expected planning to have?

2. Counselling

a. Have you been offered any counselling or workshops by your company before and/or after the return journey?

Yes

b. In what form did you receive the counselling sessions or workshops?

c. In what ways has the support affected your satisfaction?

d. Have you noticed any impact on your performance? What kind of impact?

No

e. What form of counselling would you have liked?

f. How do you think such care would have affected your satisfaction?

g. What impact on your performance would you have expected from counselling?

3. Knowledge Seeking / Transfer

a. After returning to your company, did you receive tasks that take your new skills/knowledge into account? Were workshops or similar organised to pass on knowledge?

Yes

b. What kind of knowledge transfer / application was organised?

c. In what ways has knowledge sharing/application affected your satisfaction?

d. Have you noticed any impact on your performance? What kind of impact?

No

e. What form of knowledge transfer/application would you have liked?

f. How do you think such knowledge sharing/application would have affected your satisfaction?

g. What impact on your performance would you have expected from knowledge sharing/application?

4. Logistical support

a. Have you been offered logistical support by your company for your return home? (Relocation, apartment search etc.)

Yes

b. What support did you receive?

c. In what ways has the support affected your satisfaction?

d. Have you noticed any impact on your performance? What kind of impact?

No

e. What form of logistical support would you have liked?

f. How do you think such support would have affected your satisfaction?

g. What impact on your performance would you have expected from the support?

5. Other influencing factors

a. Are there other factors that in your experience, have a positive impact on your satisfaction and performance? What do you wish you had done to better reintegrate into your company?

Topic 4: Overall process

1. Which of the influencing factors mentioned do you consider to be the most important for a positive course of the overall process? Please name and justify the most important three.

The method of data collection will primarily be based on the qualitative data analysis according to Mayring and the coding and analysis procedure will also follow his

procedure. Computer-assisted qualitative data analysis software will be used for transcription and coding. For this purpose, the software *MAXQDA 2022* will be used which is specially designed for the evaluation of qualitative data collection methods.⁷³

After the coding has been carried out with the help of the above-mentioned software, the aim will be to compile the results of the various interviews. The categories created will serve as a basis for this, as will the structure of the interview. This prepared structuring and selection of the essential contents and statements will be compiled in the form of a table. For this purpose, statements from different interviews that fit together in terms of content are brought together and presented under the same categories. This presentation and consolidation of the results make it possible to answer the research question and to confirm or reject the formulated assumptions within the framework of this work as well as to give recommendations for action.

In order to make this research as robust as possible, certain quality criteria of qualitative research are considered and adhered to. This includes the quality criteria of rule-governedness, transparency, process documentation and argumentation-support. These were adhered to and particularly considered in the preparation of the interviews as well as in their implementation and evaluation.

Results and Implications

The posting periods ranged from three months to five years and eight months. Furthermore, only three of the interviewees were accompanied abroad by their family or partner. Of the 10 participants, seven were still under 30 years old at the time of the posting. All participants were sent from their company in Germany to destination countries in Europe, Asia and North America. Four of the respondents' companies belong to the banking or finance sector, two to the automotive sector, two to the IT services sector, one to recruiting and one to mechanical engineering. In none of the cases was the stay terminated by the expatriate himself and in three cases the stay was extended.

Moreover, only three of the respondents were accompanied abroad by their family or partner. Four of the expatriates left their company within the first two years after returning, another after 3.5 years and one participant who returned only in the last few months intends to leave the company soon. Only four of the participants stayed with their company long term. The first factor investigated, which can be classified in the first of the three phases, preparation, was pre-departure training. Only five participants were offered any pre-departure training at all (Interview 1,4,8,9,10). Two companies offered both language training and intercultural training before departure (Interview 1,9). Only one other participant received the offer of a language course (Interview 4) and two other participants received the offer of cross-cultural training (Interview 8,10).

Table 1
Implementation of the content analysis according to Mayring³⁵⁻³⁷

1. Determination of source material	The body of interviews conducted
2. Analyses of the situation of origin	The aim of the interviews is to be able to answer the research question formulated for the article. For this purpose, interview partners were chosen corresponding to the previously selected definition of expatriates in order to be able to derive answers for the research question from the experiences made. The participation was voluntarily. The form in which the individual interviews were conducted is listed in the transcript for each interview.
3. Formal characteristics of the material	The oral interviews were recorded and then the participants' responses were transcribed. During the transcription, everything said was written down as accurately as possible, taking care to transcribe it into standard written German for better comprehensibility. In the case of memory protocols, the material is also available in written form.
4. Direction of the analysis	The direction of the analysis is determined by the research question and the objective of this article. The material collected is to be analysed in such a way that a statement can be made as to which supporting activities a company must offer its expatriates in order to make the process as successful as possible.
5. Theory-based differentiation of the research question	The research question arises, as the previous chapters show, from the current state of literature and theory. The research question can also be divided into several questions for the analysis of the interviews according to the following scheme: Does the influencing factor x contribute to a successful expatriate process for the employee and the organisation?
6. Analysis technique	Typifying structuring
7. Analysis units	Minimal coding unit: one word Maximal context unit: answer to a question Analysis unit: interview
8. Implementation of the material analysis	The MAXQDA 2022 software is used for this purpose.

Table 2
Interview Summary 1

Interview	Gender	Age (at time of departure)	Branch	Home Country	Host Country
1	Male	29	Finance	Germany	United Kingdom
2	Female	29	Banking	Germany	Japan
3	Male	25	Recruiting	Germany	Thailand / Vietnam
4	Male	47	Finance	Germany	USA
5	Male	26	Engineering	Germany	Finland
6	Male	25	IT Services	Germany	Ireland
7	Male	25	Finance	Germany	Poland
8	Male	38	Automotive	Germany	USA
9	Male	32	Automotive	Germany	China
10	Male	22	It Services	Germany	United Kingdom

Table 3
Interview Summary 2

Interview	Length of Assignment (initially)	Length of Assignment (actually)	Family / Partner Accompaniment	Termination after return
1	2 Years	3 Years 3 Months	No	Likely soon
2	2 Years 11 Months	2 Years 11 Months	Partner	No
3	6 Months	8.5 Months	No	Within two years
4	3 Months	3 Months	No	No
5	6 Months	1.5 Years	No	Within two years
6	3 Months	3 Months	No	Within two years
7	3 Months	3 Months	No	No
8	3 Years 8 Months	5 Years 8 Months	Partner and two (later three) kids	No
9	3 Years	3 Years	Partner and one kid	Within two years
10	5 Months	5 Months	No	After 3.5 Years

Table 4
Ranking most important Influencing Factors according to Topic 4 of the Interviews

Influencing Factor	Ranking
Logistical and administrative support	1
Training	1
Career Planning	1
Mentoring	2
Family Support	3

Other types of training were not offered or not mentioned by the participants. While only four participants were offered cross-cultural training, a total of 9 out of 10 participants requested such training. Training was only not considered necessary if the expat was already familiar with the culture of the host country (Interview 8). Language training, on the other hand, was mentioned less frequently and only four participants wished for such training. Training was not considered necessary if the language was already known (e.g. English) or the effort of learning was felt to be relatively too high for the length of the stay (Interview 1,5,8). The influence of cross-cultural training and the expectation of the influence of such training on performance was considered positive from all participants.

In particular, the quick settling in and understanding of colleagues or customers of the local culture was named as the main argument for the positive influence on performance (Interview 1,3,4,6). Language training is also perceived as important to facilitate settling in and cooperation. A negative influence of pre-departure training was not identified by any participant.

In terms of performance, no influence was attributed to language training. There was also a differentiation in some cases that performance would have remained unaffected in the home country before departure and that the influence would have had an effect on performance only later in the host country (Interview 2,5). A positive influence of pre-departure training, especially intercultural training, was also perceived or expected on satisfaction. Participants who did not receive training were partly dissatisfied because the cultural and language differences made it difficult to settle in (Interview 1,6).

The topic of mentoring was perceived very differently by the participants. None of the participants was assigned a mentor by the organisation. In many cases, however, a person who took on this role, at least in part, was found or organised independently (Interview 2,3,5,6,7,8). Before departure, none of the participants felt the need for a mentor in their home country. If a mentor was desired, it should be a contact person who is already in the host country and can clarify all technical but also private questions before departure (Interview 1,2,3,4,6,7,8,9). While all participants would have expected or felt a positive influence on their satisfaction in the case of a self-organised mentor, the question about performance was answered neutrally in most cases (Interview 3,4,5,6,7,8,10). Occasionally, a positive

effect was mentioned, since one can concentrate better on the work due to more security (Interview 1,2,6,9) but the overall picture shows a very low influence on performance. Participants who were prepared more intensively denied the desire for a mentor (Interview 10).

The scope of logistical and administrative support varies greatly from company to company. It is noticeable that the shorter is the period of the assignment, the less support the expatriates received (Interview 4,5,6,7,10). While nine out of ten participants would have liked support in finding accommodation in the host country, only six received this support. On the other hand, all participants who wanted support with administrative tasks received it, but not always to the extent they had hoped (Interview 3,9). Only two participants were offered a look and feel trip to explore the host country and the future residential area (Interview 8,9). However, four participants would have liked this (Interview 1,3,8,9). This support is especially expected for longer assignments. The shorter is the assignment, the less support was expected and needed by the expatriates (Interview 5,7,10). Only one participant did not expect any support with administrative and logistical activities and did not receive it (Interview 10). The influence of the support, as it was received or also expected according to individual needs, was assessed as very positive overall for both performance and satisfaction.

The main argument for such support for performance is that the employee himself is relieved of the organisational issues and can thus continue to work efficiently on his tasks in the home company during the preparation time (Interview 3,4,5,6,8,9). This relief also has a positive effect on satisfaction because fears and worries can be taken away and one does not have the feeling of being left alone. The participants noted that the feeling of being overwhelmed can quickly arise if such topics have to be prepared independently and without support, which can also have a negative effect on the assignment in the long term (Interview 3,7). Four of the participants did not notice or expect any impact on performance due to the support (Interview 1,2,7,10).

Two of the participants received an onboarding or welcome programme as an introduction to the host country (Interview 5,10). Only one other participant would have liked to have received such an offer (Interview 1) while the remaining participants did not mention this type of support. The participants who received this kind of support perceived it as

very positive for both performance and satisfaction. Primary drivers were the opportunity to get to know the colleagues and the working environment as well as the tasks, to establish contacts and thus to accelerate the period of adjustment (Interview 5,10).

The influence factor of the mentor was also perceived differently during the stay abroad. During this time, six participants would still have liked to have a mentor in the host country (Interview 1,3,6,7,8,9). One participant would also have been happy to have a mentor in the home country (Interview 7). Furthermore, the majority of the companies did not have a organised mentor; instead, most of the participants looked for an appropriate contact person on their own. Four participants, on the other hand, did not consider a mentor necessary and accordingly did not expect any influence on performance or satisfaction (Interview 2,4,5,10). The participants' expectation of the mentor would have been that he or she would provide assistance, especially for private questions and that he or she would be available as the first contact person on site (Interview 1,3,6,7,9).

Accordingly, the positive influence on satisfaction was assessed more positively than the influence on performance. Here, too, the increase in satisfaction is due to the elimination of uncertainties and the feeling of being alone (Interview 1,3,4,6,7,8,9). However, positive effects on performance due to the faster arrival in the culture and working environment were also identified (Interview 1,3,4,9).

Only two of the ten interview participants were offered some form of keep in touch. However, this support was not proactively provided by the company, but arose from the content of the tasks in the host country (Interview 5,8). In total, eight participants would have liked such a format (Interview 1,2,3,4,5,6,8,9) and only two participants found it unnecessary due to the shortness of their stay (Interview 7,10). A large proportion of the participants would have expected better performance from the regular information from the home company, as this would have ensured a better overall context for the tasks (Interview 1,3,4,5,8,9). None of the participants expected or noticed a negative influence on performance.

However, some participants wanted regular updates but did not expect any impact on their performance (Interview 2,3). Participants who did not receive updates often felt cut off and thus found a negative impact on their satisfaction (Interview 1,2,3,9). The support of a Keep in Touch format was perceived or expected to have a positive impact on satisfaction, as it would prevent the feeling of being out of sight out of mind (Interview 1,4,6).

Overall, the feedback on good contact with the supervisor was very evenly distributed in relation to the supervisor in the host country. Almost all participants wanted good contact and experienced it. Only one participant saw no need

for this, stating that very little to no contact with the manager was equally acceptable (Interview 9). In the case of personal differences with the manager, a negative impact on satisfaction was noted or it was expected that this dissatisfaction could also have led to a termination (Interview 1,2). The good contact with the manager in the host country, where present, led to better performance (Interview 2,3,5,7,8,9). If the relationship with the manager was good but there was little contact, no significant effect on performance was found (Interview 1,6,9).

A good relationship with the manager had a positive effect on satisfaction (Interview 2,4,5,7,8,9). Only three of the participants had contact with the manager in their home country and only five would have liked to have such contact. Contact with the home country was not considered necessary when the areas of responsibility differed greatly (Interview 7,9). Frequently, no influence on performance was attributed to the contact with the supervisor in the home country (Interview 5,6); only a positive influence on satisfaction was indicated (Interview 5,8).

Most of the participants would have liked further training. This was only considered unnecessary if training had already been carried out in the preparation phase and/or the expatriate felt sufficiently prepared (Interview 1,2,5,8). Only three of the participants were offered language training by their companies during the assignment (Interview 2,9,10). None of the participants had the opportunity to undergo additional cross-cultural training. However, this was desired by the majority, as was language training. Both trainings were said to have a positive impact on performance and satisfaction in the host country. Regarding performance, the better understanding of language and culture was mentioned, which leads to being able to react more adequately to customers and colleagues (Interview 2,3,4,9).

In terms of satisfaction, this understanding is also needed to settle in and to connect with local contacts (Interview 7,8,9,10). Since such trainings were not offered, individual participants reported that their satisfaction decreased due to the resulting poor connection to the locals (Interview 6,7,9) and that this also had a negative impact on their performance (Interview 6,7).

Participants who travelled to the host country with a partner or family were offered different types of support. Support in finding a job was not offered in any of the three cases. For the two participants with children, support was provided in finding a school and one of the participants was offered additional tutoring.

For the partners, there was a limited offer to take advantage of further training measures (Interview 8,9). Independent of the family support, five participants were offered the possibility to book flights home through the company. This offer was only available for assignments that lasted longer than 8 months (Interview 1,2,5,8,9). Participants whose

assignments were shorter (up to 5 months) did not consider flights home necessary or did not mention them (Interview 4,6,7,10).

If the family was accompanied the expatriate, the support measures had a very strong impact on the expatriate's satisfaction and performance. For example, one participant was sufficiently supported, which led to higher satisfaction and related performance, because the family was satisfied and thus private life was simplified (Interview 8). Another participant received insufficient support, which led to a premature termination of his family's stay abroad. The main reasons were that the needs of the family were not sufficiently considered, which led to a high level of dissatisfaction.

According to the expatriate, this also had a negative impact on his performance, as private life has a strong influence on working life (Interview 9). All participants who were offered flights home regardless of family accompaniment, felt or expected a positive impact on their satisfaction as a result (Interview 1,2,3,5,8,9). In some cases, performance was also assessed as better in this context, with the explanation that they wanted to give something back to the company or that they automatically performed better because they were more satisfied (Interview 1,8). Often, the influence on performance was also stated as neutral, as it was to be considered independent (Interview 1,2,4).

When it comes to career planning, a distinction must be made. The interviews revealed that no career planning is expected or assumed for short-term assignments (less than half a year) (Interview 4,6,7,10). This is because in such cases the expatriate often keeps his or her job in the home country or starts the foreign assignment as part of a training programme. In the case of longer-term stays abroad, career planning was desired by the participants in every case but was not offered by any of the companies (Interview 1,2,3,5,8,9). For the participants, there was only a promise that they would be reintegrated in the home country, but without any discussion of career opportunities or further development possibilities. It was always the expatriate's responsibility to apply for jobs on their own.

All participants who were away for a longer period would have liked support and in many cases a right of co-determination in the career planning. In the case of these participants, satisfaction was clearly negatively influenced by the lack of this support (Interview 1,2,3,8,9) and in one case also led to leaving the company at the short-term (Interview 5).

The performance of the participants was also negatively affected if the expatriate had the feeling of not being welcome and was only assigned a leftover position (Interview 2,4,8,9). The offer and the implementation of such a supportive measure could have had a positive effect on satisfaction (Interview 1,2,3,4,5,8), as well as a positive

effect on performance, since the expatriate could have prepared himself better with the knowledge of the requirements of the new position (Interview 1,3,5,8).

A differentiated picture also emerges regarding counselling. The topic of reverse cultural shock and the associated desire for support to deal with it and to support and accelerate reintegration only arose among participants who had spent more than two years abroad (Interview 1,2,8,9). All other participants felt that such support was not necessary. Primarily, there was the desire to get an offer in the home country to exchange ideas and thus accelerate reintegration. None of the companies offered active support here. This had a negative impact on satisfaction (Interview 1,2,8,9) and in some cases also on performance (Interview 2,9). Participants would have hoped for a quicker and more pleasant reintegration from such support and thus expected higher satisfaction. The impact on performance was also assessed as positive (Interview 1,2,9) or neutral (Interview 8). Only one participant would have wished for support while abroad, when his family returned early (Interview 9).

In two cases, the participants were offered a knowledge transfer service. A new position corresponding to the knowledge learnt was not offered to any of the participants. Nine out of ten participants would have liked this. Only one participant estimated the duration of the stay as too short (3 months), so that such measures would not have been worthwhile (Interview 6). Overall, the participants were frustrated or disappointed that their knowledge was not used in the company (Interview 2,3,7).

Accordingly, such an offer would have had a positive influence on satisfaction (Interview 1,3,7,8,9) and could also have improved performance, as there would have been the opportunity to apply and pass on the knowledge learnt (Interview 1,4,7,8,9). Two participants saw a negative impact on performance due to the non-existence of these offers (Interview 2,3). However, several participants showed open incomprehension about the fact that the companies do not offer such a knowledge transfer or utilisation possibility, since from their point of view, the company could also benefit greatly from it (Interview 1,2,3).

For the return journey, the logistical support of the companies is usually less than for the initial journey. For example, none of the companies offered support in finding accommodation, as the expatriates were encouraged to keep or sublet their flats, regardless of how long the stay abroad was scheduled to last. In the case of the longer assignments, the participants were again supported in moving and return flights were also organised (Interview 1,2,3,8,9). However, there were also participants who would have liked such support without receiving it.

In the case of very short stays, the support measures were not considered necessary (Interview 4,5,7,10). The support had a positive impact on satisfaction, as worries could also

be taken away and the certainty of a contact person provided more security (Interview 1,2,6,7,8,9). One participant who would have liked support, but did not receive any, felt a negative influence on his satisfaction (Interview 3). The

influence on performance was also considered positive in most cases, if the support was desired, because less stress was felt (Interview 1,2,8,9).

Table 5
Categories and Anchor Examples

Main category	Sub-category / code	Interviews	Anchor Examples
Pre-Departure Training	Higher performance	1,2,3,4,5,6,9	I4: "Intercultural training is certainly useful to look at where you are actually going. It can be good for the success of the project and for satisfaction. I1: " [...] I find this cultural training super important by now and I would also recommend that everyone has to do it. "
	Lower performance	/	/
	Higher satisfaction	1,2,3,4,5,6,7,8,9,10	I2: "I think the most important thing is [...] intercultural training and language, so that you know what you're getting into. " I5: "[...] because it would have made the first few weeks easier for me and I might not have put my foot in it. "
	Lower satisfaction	1,6	I6: "It was difficult for me to find access to any groupings. "
	No influence	2,4,5,7,8,10	I5: "I don't think it would have affected the performance in Germany. "
	No need	8	I8: "one year of study in the USA, therefore no language training necessary".
Mentoring	Higher performance	1,2,3,4,6,7,8,9	I3: " [...] extremely helpful if you have someone who knows the team, the department, who can simply give you assistance, who can simply tell you how certain things work, how you can participate in business here".
	Lower performance	6,9	I6: " [...] not in private matters. I would have liked to see a more profound interaction.
	Higher satisfaction	1,2,3,4,5,6,7,8,9	I3: " [...] the most important factor is that you have a set contact person. "I3: "[...] it helped a lot in the preparation phase - to simply express these usual open concerns and to get an answer to them. "
	Lower satisfaction	1,6,7,9	I1: " [...] when you first arrive and have this loneliness because nobody feels responsible. "
	No influence	2,3,5,7,8,10	I5: "No, I think even with a Mentor I wouldn't have noticed a big impact on performance."
	No need	4,5,7,10	I10: "No, due to the onboarding I didn't find it necessary. "
Logistical & administrative support	Higher performance	3,4,5,6,7,8,9,10	I6: "I didn't have to worry much about organisational things and had more time to concentrate on the tasks on site".
	Lower performance	3,5,7,9	I3: " [...] time where I had to deal with other things than work. "
	Higher satisfaction	1,2,3,4,5,6,7,8,9	I6: "It took away a lot of my worries and made it very easy to organise."
	Lower satisfaction	3,7	I7: " [...] otherwise you would be completely overwhelmed with these things alone and would have a negative attitude towards the whole stay abroad from the beginning."
	No influence	1,2,7,10	I7: "Not on professional performance".
	No need	10	I10: "Actually, it was okay like that, because I was able to choose a very nice flat myself."
Welcome Programme / Onboarding	Higher performance	5,10	I5: "It was also positive that the first week was used completely for the introduction [...]. There was no pressure to perform yet, but only an acclimatisation phase".
	Lower performance	/	/
	Higher satisfaction	5,10	I10: " [...] so the entry into the company with new contacts was smooth."

	Lower satisfaction	/	/
	No influence	/	/
	No need	/	/
Keep in Touch	Higher performance	1,3,4,5,8,9	I9: "[...] getting more information from headquarters can in any case contribute to better performance, as it gives an understanding of the overall picture of the company. "
	Lower performance	/	/
	Higher satisfaction	1,2,4,5,6,8	I1: "[...] the satisfaction would definitely have been better if you had received something in some way, I'll say every six months or something, that would have helped you to know what was actually happening at home."
	Lower satisfaction	1,3,9	I1: "[...] it was very frustrating not to hear anything." I9 "[...] out of sight out of mind".
	No influence	2,3,7,10	I7: "neutral (impact on satisfaction and performance)".
	No need	6,7,8	I7: "[...] a completed period on site and then I came back to a new department and started my next run there, so I didn't miss any Keep in Touch on the professional side."
Supervisor contact	Higher performance	1,2,3,5,7,8,9,10	I7: "A supervisor is crucial in supporting the integration on site, so that one does not feel left alone and helpless. At the same time, this also demonstrates the appreciation shown."
	Lower performance	/	/
	Higher satisfaction	2,4,5,7,8,9,10	I4: "Basically, regular and appreciative, motivating contact is very good."
	Lower satisfaction	1,2,4,7	I2: "Well, if I hadn't been able to cope with him, I don't think I would have stayed there as long."
	No influence	1,3,5,6,9	I9: "[...] just let me do what I wanted to do without telling me what to do - that was also ok. "
	No need	9	I9: "I no longer had a supervisor in the home country, so I didn't need any contact there."
On-Assignment Training	Higher performance	2,3,4,5,7,9,10	I2: "[...] Body language and various little conversations that the Japanese had among themselves made me realise, are you on the wrong track here or is this going down well? So from that point of view, it helped me a lot."
	Lower performance	6,7	I6: "[...] as I just said, my motivation for the work has decreased a lot."
	Higher satisfaction	2,3,4,5,7,8,9,10	I8: "Language training and cross-cultural training are a must-have to be satisfied during the assignment and also to feel comfortable and find your way in the country, also to connect. "
	Lower satisfaction	6,7,9	I9: "I was partly frustrated because it is a very difficult language and I often had difficulties".
	No influence	/	/
	No need	1,2,5,8	I1: "I think I was already relatively well prepared with what I got in Germany".
Family Support	Higher performance	1,6,7,8	I6: "when accompanied by the family, I feel that appropriate support from the company is essential to keep satisfaction but also performance high".
	Lower performance	8,9	I8: "If the family cannot find a connection and cannot adapt, it is hardly possible to work there."
	Higher satisfaction	1,2,4,6,7,8	I8: "It is also essential to involve and support the family by offering further education for the partner, finding a school and support for the children".
	Lower satisfaction	8,9	I8: "Danger of dropping out or poor performance due to dissatisfaction and lack of connection. "

Career Planning			I9: "Wife and daughter then moved back to Germany after just over a year".
	No influence	1,2,4	I1: "Well, I don't think it has made you better or worse either."
	No need	5,6,7,10	I6: "[...] the stay was too short and I travelled alone".
	Higher performance	1,3,5,8	I1: "You get involved in a completely different way, in the sense that you can prepare and do things."
	Lower performance	2,4,8,9	I8: "Reintegration in the company is also essential that [...] suitable positions are found, so that you don't have the feeling that you are no longer welcome."
	Higher satisfaction	1,2,3,4,5,8	I1: "Satisfaction increases with realising that you are being heard and that someone else cares too."
	Lower satisfaction	1,2,3,4,5,8,9	I5: "By the fact that even after a few weeks after returning, it was still not planned where my next project would take place or what my next project would be, I also decided to leave the company."
Counselling	No influence	2,4,9	I2: "It wasn't the Japanese' fault and therefore it didn't affect my performance because I never related it to the Japanese."
	No need	6,7,10	I7: "I do not see this as relevant to my stay abroad, as it was a completed short-term posting. I would not have expected any career planning for this short period."
	Higher performance	1,4,9	I1: "You can do your job better and you also feel better personally because you feel more cared for."
	Lower performance	2,3,5	I2: "I didn't have anyone to talk to at all and there was zero integration. And that had a very hard effect on the desire for the new job and the desire to be back in Germany."
	Higher satisfaction	1,3,4,8	I8: "Especially in the first few months, because you compare countries a lot. After half a year, the feeling was gone again. With an offer, it might have gone faster."
	Lower satisfaction	2,3,5,8,9	I9: "[...] as I felt left alone by my company all along the line when I returned."
	No influence	8	I8: "Not for me, no." (influence on performance)
Knowledge Seeking / Transfer	No need	4,5,6,7,9,10	I5: "The cultural differences were not that big and the period was not very long, so I would not have considered such an offer necessary".
	Higher performance	1,4,7,8,9	I8: "[...] if someone brings the leadership experience and the market experience, the company gets the most out of it."
	Lower performance	2,3	I3: "There were very good approaches and they were simply abandoned and that had a negative impact on my satisfaction and also on my performance."
	Higher satisfaction	1,3,4,7,8,9,10	I1: "Well, I think everyone who has some kind of expertise and is asked about it, feels good about it".
	Lower satisfaction	2,3,4,7	I2: "Because I enjoyed it, I continued to train and I was able to use zero, expand zero of the knowledge I acquired and was very dissatisfied because of that."
	No influence	5,10	I5: "Neither positive nor negative (impact on my performance and satisfaction)".
	No need	6	I6: "That wasn't necessary either because the length of my stay was too short."
Logistical support (Return)	Higher performance	1,2,8,9	I1: "But it is good to know that there is a contact person. So just picking up the phone and saying 'can we talk very briefly'."
	Lower performance	1,3	I1: "So at the moment I feel even more stressed during the last month."
	Higher satisfaction	1,2,6,7,8,9	I8: "One had no worries."
	Lower satisfaction	3	I3: "[...] that I have to take care of it. Therefore, this has of course had a rather negative effect (on my satisfaction)."
	No influence	6	I6: "No (I could not see any impact on my performance)."
	No need	4,5,7,10	I4: "I didn't need any support for the return journey".

With the basic assumption one, the thesis was established that the respective influencing factors have a positive effect on the success factors of performance and satisfaction. In its entirety, this basic assumption has been confirmed. If we look at the results in detail, we can identify individual factors that have a particularly strong influence on either performance or satisfaction and others that only have a moderate effect. To be able to assess the basic assumption in more detail, these factors should be looked at more closely. The evaluation has shown that the needs of expatriates differ according to the length of stay.

Likewise, the expectations of the company change depending on whether the employee is accompanied by his or her family or partner. Therefore, the characteristics of the length of stay and family accompaniment are considered in the assessment where it makes sense to do so.

In the preparation phase, the influence factor of pre-departure training has a strong impact on the expatriate's satisfaction. The impact on performance is not as pronounced, but the feeling of satisfaction also has a positive effect on performance. The influencing factor of mentoring was also answered differently in the interviews, as already described in the literature. Basically, the expatriates want a fixed contact person who gives them an insight into what they will be facing. This has a very strong influence on satisfaction. However, this mentor does not necessarily have to be specifically named by the company. The impact on pre-departure performance was described as neutral or weakly positive, which is why this factor primarily influences higher satisfaction.

Support from the company in logistical and administrative activities has a positive effect on performance, as the employee has to complete fewer tasks independently and in parallel. However, this factor has a greater influence on satisfaction. Here, the criteria of length of stay and support must be considered: The longer is the stay and if the expatriate is accompanied, the more support is expected from the company and the stronger are the corresponding effects on satisfaction and performance.

In the second phase, the assignment, the topic of the onboarding programme was inductively added to the influencing factors. Since very few participants commented on it, it is not possible to determine the extent of the influence. The influence factor of the mentor has a weaker influence on satisfaction in this phase than before and the influence on performance remains neutral to slightly positive.

Both the influence factors of Keep in Touch and the contact with the supervisor have a positive influence on performance and satisfaction. While Keep in Touch can also lead to dissatisfaction in case of absence, the influence is perceived as neutral in case of little or hardly any contact with the supervisor.

However, a negative relationship with the supervisor in the host country can lead to the termination of the stay abroad and has a correspondingly strong effect on satisfaction. An equally essential influencing factor, both on satisfaction and performance, is the possibility of further on-site training for the employee.

This has already been identified in the literature and was confirmed by the evaluation of the interviews. At this point, it should be noted that the length of stay also plays an important role. The longer is the planned period, the more essential the offer of training is for the success of the assignment.

If the expatriate is accompanied by his or her family or partner, the offers of family support are also essential for success. It is important that the needs of the family are considered and that they are included in all decisions. If the family does not receive the support they need and expect, this has a strong negative impact on satisfaction and performance. In addition, for all longer stays, it is important to provide opportunities for expats travelling alone to visit their family.

In the context of repatriation, career planning and offers for knowledge seeking / transfer are the essential driving factors influencing satisfaction. Here, too, it must be considered that this influence becomes stronger, the longer is the length of stay for the assignment. If the new skills and know-how of the expatriate are not used and there is no corresponding planning, the resulting dissatisfaction can lead to leaving the company.

The influencing factor of counselling is only needed if it is a long-term stay abroad and primarily affects satisfaction. Logistical support for the return journey is also needed and has a correspondingly greater effect of the stay is longer and more people are in the host country. As with the outward journey, this factor has a positive effect on satisfaction and performance.

Overall, it can be determined that the influencing factors depend on the duration of the assignment and the expatriate's support, but also have a stronger overall effect on the expatriate's satisfaction than on his or her performance.

The second basic assumption is that for the sustainable success of the expatriate process, expatriate satisfaction is more important than performance, also because satisfaction affects performance. This basic assumption was also confirmed by the evaluation of the results. It was mentioned at various points that the process was almost terminated due to high dissatisfaction. People also left the company after returning due to dissatisfaction. None of the participants mentioned poor performance as a reason for leaving. It was also mentioned in several statements on performance that this had also increased due to improved satisfaction and had thus benefited secondarily from the influencing factor.

Table 6
Overview Influencing Factors

Phase	Factor	Characteristic	# received support	# wanted support	# no need	# not mentioned
Preparation	Pre-Departure Training	Cross-cultural Training	4	9	1	0
		Language Training	3	4	3	3
	Mentoring	Home Country	0	0	10	0
		Host Country	0	7	3	0
	Logistical and Administrative Support	Flat hunting	6	9	1	0
		Application for needed documents	7	7	3	0
		Schedule flights / Transport	8	8	1	1
		Relocation services	4	5	1	4
		Look & Feel Trip	2	4	1	5
Assignment	Welcome Program / Onboarding		2	3	0	7
	Mentor	Home Country	0	1	7	2
		Host Country	0	6	4	0
	Keep in Touch		2	8	2	0
	Supervisor Contact	Host Country Supervisor	9	9	1	0
		Home Country Supervisor	3	5	3	2
	On-Assignment Training	Language Training	3	6	3	1
		Cross-cultural Training	0	6	3	1
	Family Support	Further education offers	2	2	2	6
		Tutoring (kids)	1	0	3	7
		Finding a school	2	2	2	6
		Flights home	5	5	3	2
Repatriation	Career Planning	Concrete specification	1	3	2	5
		Joint decision making	0	5	3	2
	Counselling	In Host Country	0	1	1	8
		In Home Country	0	5	5	0
	Knowledge Seeking / Transfer	Workshops	2	7	1	2
		In new Position	0	4	1	5
	Logistical Support	Relocation Service	5	6	1	3
		Flat Hunting	0	2	7	1
		Flight / Transport	6	8	2	0

Looking at the most important influencing factors identified by the participants in the overall process, these factors are logistical and administrative support, training, career planning, mentoring and family support (Table 3). With the help of these factors, basic assumption three, namely that they are consistent with Lewin's²⁹ model of change, can be confirmed. The logistical and administrative support actively helps to start and accelerate the unfreezing process. The expatriate is supported at this point to prepare for the upcoming upheaval. The training also serves this purpose. With the help of the training, habits and behavioural patterns can be shown that the expatriate must discard or change during his assignment. At the same time, the training already influences the movement phase, as new behavioural patterns

are learned. Both the support of the family and the provision of a mentor provide support in the movement phase.

As Lewin²⁹ has noted, the change process is particularly dependent on group dynamics. The involvement of the family and the connection to a new group through a contact person, such as a mentor, are an essential part of the change process. The last factor identified as very important is reintegration and career planning. Here, in the sense of the freeze, it is important to consolidate what has been learnt and incorporate it into everyday life. To master this step successfully, a job must be found that considers what has been learnt and does not cause the expatriate to fall back into old patterns.

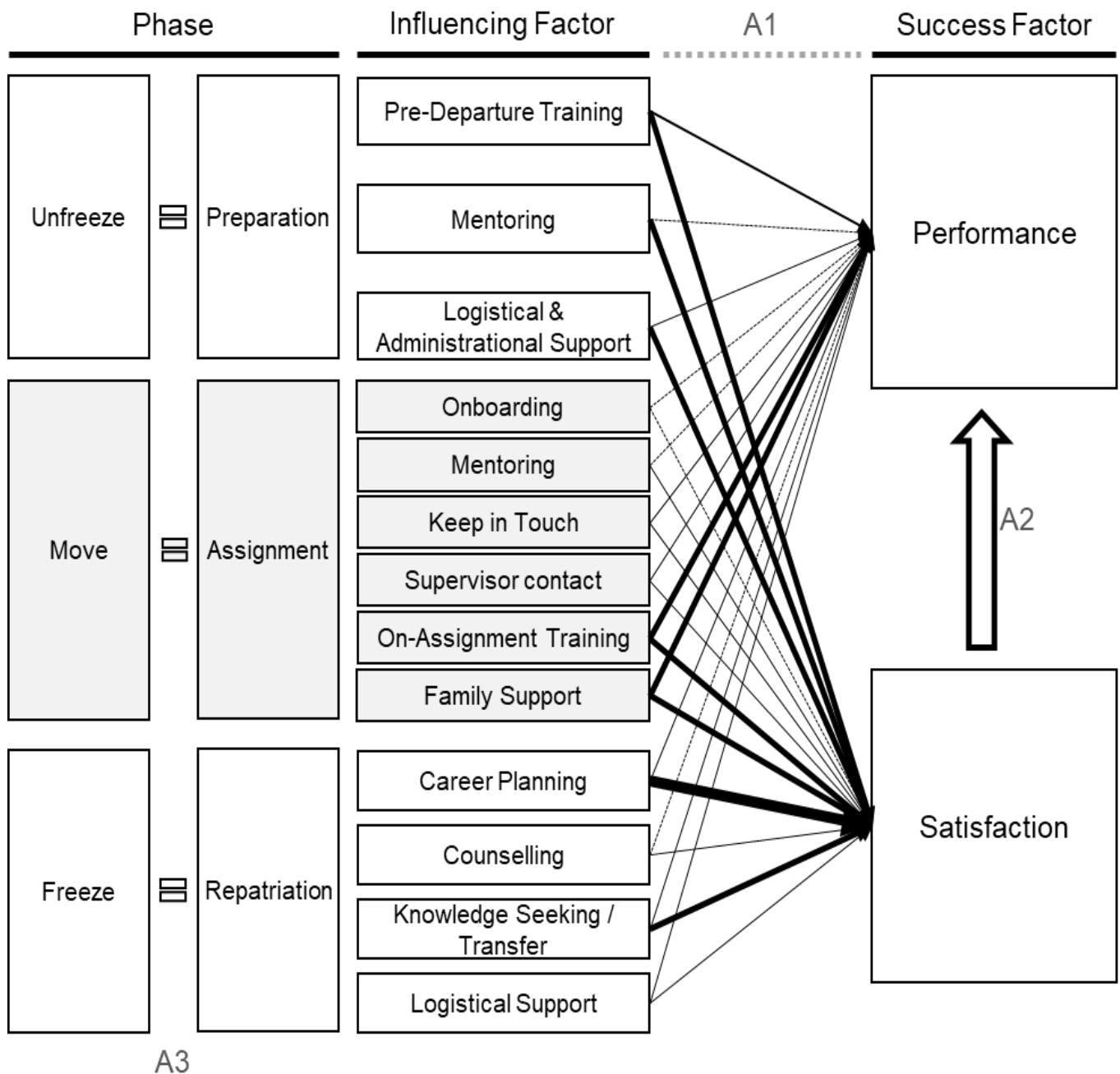


Figure 4: Review of Research Framework

In accordance with the results obtained above, the following recommendations for action can be made in practice:

- In general, the amount and intensity of the support measures should be adjusted according to the duration of the stay and the external circumstances such as family support or previous experience. The shorter is the stay abroad, the fewer measures are required to ensure a successful expatriate process. Nevertheless, the needs of the expatriate must be considered in any case.
- The scope of logistical and administrative support can and should also be adapted to external circumstances. As a minimum, each company should assist expatriates

in finding accommodation and applying for all relevant and required documents and be available to answer questions in this regard. If it is a long-term stay, further measures such as a look and feel trip and the provision of relocation services should be provided.

- Regardless of the destination country and regardless of the planned assignment period, all expatriates should always be offered cross-cultural training, as this has a significant impact on satisfaction and on performance during the assignment. Language training should also be part of the standard offer to support the expatriate. Depending on the need, this offer should continue to be available to the expatriate in the host country.

- If the expatriate is accompanied by his or her family, the company must provide a corresponding amount and desired support to ensure well-being. This includes training offers for the family, as well as support in the search for school and housing, support for the partner's job search or further training offers, so that the family also feels integrated in the host country. Equally important is the possibility of flights home to visit family and friends.
- Especially after longer assignments, organisations must offer expatriates attractive opportunities for further development and, by finding suitable positions. Use the know-how gained for the benefit of both the organisation and the expatriate. If the expatriate wants to develop in a different direction, workshops or similar formats must be held to pass on knowledge and ensure that the know-how gained is not lost. Planning must be done proactively by the organisation and in consultation with the expatriate.

Viewing the expatriate process as a change process can help to better manage the employee and identify their needs while ensuring success for the organisation.

Discussion

The main finding of this study is the reconfirmation that various business support measures have significant positive effects on the likelihood of success of employee secondment. The measures must be individually adapted depending on the length of the assignment, the country of residence and the accompaniment status of the employee. The most important factors for success in the overall process - irrespective of the characteristics just mentioned - are logistical and administrative support as well as preparatory training in the preparatory phase, the provision of a contact person and, if necessary, support for the family during the preparatory phase and during the assignment and, as an essential factor for sustainable success and the expatriate's retention in the organisation, joint career planning. In addition, Lewin's²⁹ three-phase model can be used to better understand the process and to accompany it in a goal-oriented manner on the part of the organisation.

In previous research, the focus was on individual influencing factors or the individual phases of the expatriate process. This study is to show which of the influencing factors are the most relevant for the success of the overall process: namely, the administrative and logistical support, training and career planning, supplemented by family support when needed and the provision of a mentor or a permanent contact person. In addition, this work has shown that employee satisfaction is a crucial factor for the long-term success of an employee secondment and which of the influencing factors investigated have a primary effect on satisfaction. An identical picture emerges as that of the most relevant influencing factors. In addition to these findings, it was possible to establish a link between Lewin's²⁹ three-phase

model and the expatriate management process. In essence, this means that the drivers of change identified by Lewin correspond to those of the expatriate process and thus the three-phase model can be applied to methodically accompany the change that the employee undergoes. The factors considered particularly important and necessary by Lewin²⁹ such as the breaking up of familiar structures, group dynamics and the repetitive application of what is learnt to achieve sustainable change, can be applied to the expatriate process and correspond to the relevant influencing factors. By applying the model, a better understanding of the expatriate and his or her needs can be ensured and accordingly better support by the organisation.

With the help of the recommendations for action, it should be possible for organisations to increase the success rate of expatriate assignments and thus reduce costs or use the available resources in the form of expatriates more efficiently and profitably. If the assignments are more successful, the organisation's competitive advantage can be expanded further and faster. The organisation's reputation can also be enhanced by a higher success rate which can also lead to a competitive advantage on the employer market. In summary, organisations must expand their support measures within the framework of the expatriation process and use them as needed.

Each organisation must find a suitable scope but must not neglect the measures identified as essential. It can make sense to offer standardised support measures depending on the duration of the stay and the family's accompaniment and thus to standardise the process regarding certain posting characteristics.

In terms of theory development, it was shown to what extent Lewin's²⁹ three-phase model can be reconciled with the expatriate process. The three phases of unfreeze, move and freeze correspond in their characteristics to the three phases of preparation, assignment and repatriation. Accordingly, the expatriate process can also be seen as a change that the employee undergoes. The goal is to reach a higher level i.e. the further development of the employee and thus the added value that the employee creates for the organisation. During the interviews, the participants also identified an onboarding or welcome programme as a factor influencing the success of the expatriate process.

The results of this work are to be classified regarding the following limitations and treated accordingly. Due to the survey method and the associated sample size, the results cannot be regarded as representative, but offer indications based on the scientifically conscientious and carefully conducted method. Also, the results cannot be assumed to be internationally valid, since all participants are of German nationality. Given cultural differences, the needs identified by the interview participants cannot be transferred beyond doubt to expatriates from other countries and cultures.

Furthermore, the recommendations for action have not yet been implemented in practice and the corresponding results verified. All assumptions about the effects of implementing the recommended measures to make the expatriate process more successful are based on the underlying literature and the statements of the interview participants. In addition, the time span of the assignments observed is very broad. Although this has led to the conclusion that organisations should also orient their measures to the time span, the small number of participants has also led to very different statements and thus prevented a more conclusive picture regarding the individual influencing factors.

The limitations pointed out offer several possibilities for further investigations. In principle, the results obtained should be tested for their resilience in further studies with the help of a quantitative investigation. In the course of this, it can also be examined in more detail which influencing factors are required to what extent and under which external circumstances of the posting. Comparisons or parallels to the results of the German expatriates can also be identified with further studies in other countries. Furthermore, the implementation in an organisation should be accompanied in the long term and thus the actual effectiveness of the measures can be determined.

In the context of further research, the connection between Lewin's²⁹ three-phase model of change should be studied more closely and a further development of the model should take place in relation to employee secondment. The identified commonalities should be statistically tested, especially within the context of a quantitative study and modified according to the results in order to develop suitable methods in the long term to use the change model profitably in practice for employee assignments.

Conclusion

Accelerated and conditioned by digitalisation and globalisation, more and more organisations are opening up new international markets. In doing so, many organisations rely on their employees based in the country of origin as carriers of know-how and success. The cost of expatriates and their support is many times higher than that of a local workforce. Nevertheless, organisations expect sufficient success from these measures to make the effort worthwhile. However, studies have shown that up to 40% of foreign assignments end in failure and the organisations are left with both direct and indirect costs. To prevent this, the organisations can offer numerous measures as support which act as positive influencing factors on success.

The essential factors that increase the likelihood of success by increasing satisfaction and performance include administrative and logistical support, training, mentoring, family support and binding and joint career planning. The scope of the measures must be adapted to the duration of the stay and the conditions of the assignment. In addition, the organisation can support the expatriation by perceiving it as

a process of change according to Lewin's three-phase model. The three phases of the expatriate process can be equated with the change process. By adapting the supporting measures, not only can costs be saved through the termination of assignments or the loss of employees, but additional added value can also be created for the organisation through the efficient use of successful expatriates. Career planning in particular is essential for long-term added value on the corporate side, but also for the satisfaction of the employee.

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