



INTERNATIONAL JOURNAL OF RESEARCH IN COMMERCE AND MANAGEMENT

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EMPIRICAL STUDY ON EXPATRIATE'S OFFICIAL, CULTURAL AND FAMILY PROBLEMS WITH REFERENCE TO BANGALORE, INDIA

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ABSTRACT

The empirical study is intended to assess the expatriates' job related issues, family issues and cultural issues of the host country. The main objective is classified into sub-objectives and formulated as hypothesis. The sub-objectives were to test whether age and satisfaction with monetary benefits are dependent; whether there is a relationship between number of years of experience and pre-departure training given by the company; whether previous international experience and expatriates work satisfaction are dependent; whether there is a relationship between expatriates preference to travel abroad and ability of spouse to adjust; and whether marital status and willingness to return to India are dependent. Most of the respondents in the study belonged to the high-tech (computers, software, electronics and communication industry). Data was collected from 75 respondents, only from Bangalore, India. Percentages, correlation and chi-square were used to analyze the collected data. The results revealed that, for all the research questions, the alternate hypothesis was accepted; which meant that age and satisfaction with monetary benefits are dependent; there is a relationship between number of years of experience and pre-departure training given by the company; previous international experience and expatriates' work satisfaction are dependent; there is a relationship between expatriates preferring to travel abroad and the ability of spouse to adjust to the culture of the foreign country; marital status and willingness to return to India are dependent on each other.

KEY WORD

Culture, Expatriates, Problems, Training.

INTRODUCTION

Localization, privatization and globalization of the Indian market have changed the corporate setup. With increased dependence on other countries, the problems encountered in dealing with varied cultures, governments, interpersonal behaviors and social settings are manifold. Multinational Companies (MNCs) are finding it as a challenge to establish and succeed in their countries of operation. Because of the diversity in business settings, different strategies are adopted in different countries. They understand that they cannot follow 'one size fits all method'. They need not and should not follow the multinational giants as role models in their pursuit of capturing international markets (Baruch, Steele, and Quantrill, 2002). A 'tailor-made' approach helps the MNCs to succeed in their international ventures. Thus, the need of the hour is to formulate a different strategy, policy and practice for their international operations, specifically for people management, (Baruch, Steele, and Quantrill, 2002) because, they are depending on Parent Country Nationals, Host Country Nationals and even Third Country Nationals. Employees who are selected for international assignments and are relocated to an overseas operation for an extended period of time are technically termed as 'Expatriates'. Any individual will be ready to take up foreign assignment only if he has the right frame of mind (Baruch, Steele, and Quantrill, 2002). The adventurousness facet, assesses one's predisposition toward new food, travel and variety over routine, has considerable potential to inform the understanding of how personality can influence manager's willingness to assume different types of global assignments. (Konapaskie. et al., 2009). Similarly, personality traits such as extroversion, sociability and openness to new experience are considered important for expatriates (Caliguiri P., 2000). As expatriates are relocating themselves, sometimes along with their family, at an extended cost by the organization itself, they are pressurized to accomplish their assigned task within the period of their stay. It may not be possible for all expatriates to perform outstandingly in their overseas venture always, because, they may face manifold problems and hence become unsuccessful. These unsuccessful assignments are a huge cost to the company and managers are attempting to reduce the uncertainty gap by familiarizing the new place through cross cultural training. Expatriate literature has defined failure rate as the number of percentage of employees who return home early, prior to the official end of an agreed term abroad because of poor performance and/or personal problems (Forster Nick, 1997). Premature re-entry is a very inadequate way to measure expatriate failure (Harzing, 1995). Although expatriate failure rate is considered to be high, there is no substantial empirical study to prove it to be so (Harzing, 1995; Forster, 1997). The myth of high expatriate failure rate is created only by misquotations (Harzing, 1995). Nevertheless, all expatriates continually have concerns during their expatriation and repatriation. The article aims to analyze the cultural, official and family problems faced by expatriates by adopting a structured questionnaire.

EXPATRIATES AND OFFICIAL PROBLEMS

Sustained company support is critical for any expatriate when he is overseas. He expects support in settling in the foreign land with accommodation, school, hospital assistance; induction into the new organization; language and etiquettes training; cultural, political and regional understanding of the new place. Companies design the training programme depending on the duration of the assignment. The more the period of stay in the host country, the longer will be the training given (Dowling, Welch., 2009). Most companies do not support giving training to its expatriates, because they opine that culture is something which cannot be learnt through training; it has to be experienced by an individual to know what to do and what not to do. However, when companies are giving training to expatriates, it creates awareness to the expatriates that these kinds of difficulties will be experienced in the new place and thereby, mentally helps in reducing the culture shock (Katz and David, 1996). Though, the company provides initial *survival* training and assistance when he is moving to the host country, most employers do not heed to the expatriates after a specific term. They behave like as if "Out of sight is out of mind" (Baruch, 2002). More than the experience of being an expat, they feel that repatriation is dreadful because there is no guarantee of your job upon return. One executive was told he had six months to find a place in the company or else he would have to start looking elsewhere (Mendenhall., Oddou., 2001). Further, he might have lost his promotion opportunities during his stint abroad. Expatriates also grumble that the experience they gained was not recognized (Baruch, 2002).

EXPATRIATES AND CULTURAL PROBLEMS

Values, attitudes, beliefs, aspirations and culture determine a person's behavior (Baruch, 2002). In the words of Geert Hofstede, "Culture is the collective programming of the mind that distinguishes one group or category of people from another. Culture is a construct-not directly accessible to observation but inferable from verbal statements and other behaviors and useful in predicting still other observable and measurable verbal and non-verbal behavior" (Hofstede 1993). It is difficult to differentiate whether a particular behavior is caused due to attitudes, values, beliefs or culture. An individual's personality is determined by the sum total of all these variables. When a person is characterized by ethnocentrism or parochialism, it may be very difficult to acclimatize in the new atmosphere. On the other hand, if he is culturally empathetic, he is likely to become successful overseas. The first step in cultural awareness is recognizing and accepting other cultures (Harrison, 1994). Several researchers have defined the attributes required in an overseas assignment. When an expatriate possess personality traits as Openness and sociability, his cross-cultural adjustment will be greater (Caliguiri, 2000). In a survey of expatriate managers of 40 multinational companies in Japan, the results showed that understanding of the firm's mission, leadership ability, understanding of host nation's culture, communication skills and overseas business experience were the most important requirements for an expatriate manager to be successful (Hogan and Goodson, 1990).

EXPATRIATES AND FAMILY PROBLEMS

Literature reviews prove that inability of the spouse and children to adjust is the predominant reason for high expatriate failure rates (Katz and David, 1996). Partners / spouses are the ones who are interacting with their neighbors, struggling to buy groceries, communicating with their child's teachers, and therefore they should be given cross-cultural training (Frazee, 1999). In order to assist the family in resolving its issues, the company provides special training to spouse and children. Also, companies facilitate in providing employment assistance to the spouse, if they are a dual-career couple. A family pre-departure orientation is emphasized, as it can make the foreign assignment as a motivational force rather than as a stressful experience for the expatriate (Hogan and Goodson, 1990). Literature review on problems of expatriation has testimonials that the human resource managers are taking ample measures to set-right the issues. Nevertheless, problems are problems and it continues to be disturbing successful international assignment.

REVIEW OF LITERATURE

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

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

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

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

BACKGROUND OF THE STUDY

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

PRIMARY OBJECTIVE

1. To understand the official, cultural and family problems of expatriates.

SECONDARY OBJECTIVE

To test whether-

1. Age and satisfaction with monetary benefits are dependent?
2. There is a relationship between number of years of experience and pre-departure training given by the company?
3. Previous international experience and expatriates work satisfaction are dependent?
4. There is a relationship between expatriates enjoying to travel abroad and ability of spouse to adjust to the culture of the foreign country?
5. Marital status of expatriates and willingness to return to India are dependent?

Rank the factors that were more satisfactory in the foreign country.

METHODOLOGY

The data was collected during January 2009 and June 2009. Employees who had travelled on international assignments for a minimum period of three months to two years were considered as respondents for this study. The respondents were chosen by adopting snowball sampling technique. A total of 107 expatriates were contacted and 75 had responded for a response rate of 70 percent. Structured questionnaire along with semi-structured interviews were used for collecting data. The questionnaire consisted of demographic details of expatriates, followed by questions relating to job, family and cultural issues of expatriates.

The questionnaire was formulated using a 5 point likert scale. Responses were collected personally as well as through email. Three people were identified for the semi-structured interview. Appointments were fixed over telephone and then the respondent was interviewed as per the convenience of the researcher and the respondent. During the interview the respondent was allowed to explain his own experiences and problems during expatriation leading to fewer questions from the researcher. This helped the researcher to identify minute difficulties of expatriates. The questionnaire tested for cronbach's alpha revealed 0.793, 0.861 and 0.724 on job-related, family related and culture related questions respectively. Descriptive statistics like percentage, correlation, ranking and inference statistics like chi-square were used to analyze data. Qualitative judgments were used to interpret data relating to semi-structured interviews.

DATA ANALYSIS

Results of descriptive statistics revealed the following information. 91% were male and 9% were female in this study. A majority of the respondents belonged to the high-tech (computer, software, electronic and communication) industry. Also, most of the respondents belonged to the age group of 26-30. 41% were having less than 5 years of working experience, whereas, 39% had 6-10 years of working experience. Pre-departure training was given to 65% of the expatriates. Only 21% opined that they received post departure training in their host country. Only 56% gave the opinion that the training given by the Indian office was purposeful and helpful. Offshore assignments, being very lucrative, only 68% were satisfied with the monetary benefits there. The company also helped in relocating back to India after their assignments (55%). 34% agreed that their spouse could adjust to the new place. Only 13% could employ their spouse easily there. When asked whether it was challenging to adapt to their culture, 31 % were neutral to it, and 34% agreed that it was challenging to adapt. A majority of 48% disagreed that the social values of the country are similar to our values, and nearly 20 % were neutral to it. They were not discriminated as a 'foreigner' during their stay abroad (65%).

The secondary objectives were tested by formulating hypothesis.

1. *To test whether age and satisfaction with monetary benefits are dependent, the null and alternate hypotheses was-*

H₀: Age and satisfaction with monetary benefits are independent.

H₁: Age and satisfaction with monetary benefits are dependent.

χ^2 test was used to test the hypothesis

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	21.975 ^a	16	.144
Likelihood Ratio	23.478	16	.102
Linear-by-Linear Association	.023	1	.880
N of Valid Cases	75		

a. 20 cells (80.0%) have expected count less than 5. The minimum expected count is .03.

Since the p-value (0.144) is greater at 0.05 level of significance the null hypothesis is rejected and the alternate hypothesis is accepted. Therefore, there is no sample evidence to say that age and satisfaction with monetary benefits are independent.

2. *To test whether there is a relationship between number of years of experience and pre-departure training given by the company, the null and alternate hypotheses formulated was*

H₀: There is a no relationship between number of years of experience and pre-departure training given by the company

H₁: There is a relationship between number of years of experience and pre-departure training given by the company

The hypothesis was tested by using χ^2 tests.

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	21.488 ^a	20	.369
Likelihood Ratio	21.231	20	.384
Linear-by-Linear Association	2.398	1	.121
N of Valid Cases	75		

a. 26 cells (86.7%) have expected count less than 5. The Minimum expected count is .04.

Since the calculated χ^2 value is greater (0.369) at 0.05 level of significance, the null hypothesis is rejected and the alternate hypothesis is accepted.

The calculated correlation value (0.180) indicates that there exists a weak positive correlation, as the value is nearing zero. Therefore, the sample evidence supports that there is a relationship between number of years of experience and pre-departure training given by the company.

3. *To test whether previous international experience and expatriates work satisfaction are dependent, the hypotheses formulated were-*

H₀: Previous international experience and expatriates' work satisfaction are independent

H₁: Previous international experience and expatriates' work satisfaction are dependent.

χ^2 test was used to test the hypothesis

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	3.042 ^a	5	.694
Likelihood Ratio	3.653	5	.600
Linear-by-Linear Association	.449	1	.503
N of Valid Cases	75		

a. 7 cells (58.3%) have expected count less than 5. The minimum expected count is .31.

p-value of χ^2 is 0.694 and it is greater than 0.05 level of significance. Therefore, the null hypothesis is rejected and the alternate hypothesis is accepted. Therefore, the sample evidence support that previous international experience and expatriates' work satisfaction are dependent.

4. To test whether there is a relationship between expatriates enjoying to travel abroad and ability of spouse to adjust to the culture of the foreign county, the null and alternate hypotheses was-

H₀: There is no relationship between expatriate preferring to travel abroad and the ability of spouse to adjust to the culture of the foreign country.

H₁: There is a relationship between expatriate preferring to travel abroad and the ability of spouse to adjust to the culture of the foreign country.

Test Used: χ^2 test

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	3.438 ^a	3	.329
Likelihood Ratio	2.796	3	.424
Linear-by-Linear Association	.003	1	.955
N of Valid Cases	74		

a. 4 cells (50.0%) have expected count less than 5. The minimum expected count is .69.

The χ^2 value of 0.329 indicates that it is greater at 0.05 level of significance. Correlation results proved that there is a negative relationship (-.007) between these two factors. Therefore, the null hypothesis is rejected and the alternate hypothesis is accepted.

We can assert from this sample, that there is a relationship between expatriates preferring to travel abroad and the ability of spouse to adjust to the culture of the foreign country.

5. To test whether marital status of expatriates and willingness to return to India are dependent, the hypotheses were formulated as

H₀: Marital status and willingness to return to India are independent.

H₁: Marital status and willingness to return to India are dependent.

Test used: χ^2 test

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	10.813 ^a	5	.055
Likelihood Ratio	13.384	5	.020
Linear-by-Linear Association	4.555	1	.033
N of Valid Cases	75		

a. 5 cells (41.7%) have expected count less than 5. The minimum expected count is .44.

As the p-value is 0.055 at 0.05 level of significance the null hypothesis is rejected and the alternate hypothesis is accepted

Hence, marital status and willingness to return to India are dependent on each other.

On ranking factors like people, climate, food, city/country, job and branch office on a scale of 1-6, the following were the ranks given by the respondents: The table 1 below indicates that respondent's ranked city/country of visit as the most satisfying attribute followed by the job undertaken, people of that country, climate, the branch office and finally food.

TABLE 1: SHOWING RANKS GIVEN TO VARIOUS ATTRIBUTES BY RESPONDENTS

Rank	Attributes
First	City/Country
Second	Job
Third	People
Fourth	Climate
Fifth	Branch Office
Sixth	Food

DISCUSSION

Research findings of this sample show that the pre-departure training given by the company was not very useful for expatriates, so, companies can think of any other ways of training /orienting them. Other method suggested could be to invite other expatriates who had travelled to the same destination country and engage in a one-on-one discussion rather than hosting a typical training session. This would facilitate the employee to become mentally prepared for the new environment. Pre-departure training should be compulsorily given for less-experienced people. As they are naïve and may not know the new culture, they may experience severe culture shock, compared to those who have significant work experience. In this study, most of the respondents belonged to the 26-30 age group. Therefore, it is suggested to create awareness of the new things that they will face and thereby reduce the severity of culture shock.

The sample in this study supports the view that previous international experience and work satisfaction are dependent. Hence, it would be ideal to identify and send expatriates with onsite experience abroad. It is logical to assume that their previous experience will facilitate adjustment in a new setting (Black, Mendenhall, Oddou, 1991). Contrary to this point, even though 75% (43% had visited atleast two countries + 32% had visited two to four countries) of the respondents had previous international experience, still they found it challenging to adapt to the new culture. During interviews with expatriates, they also gave the opinion that adapting and liking a culture cannot be taught literally, but proper training definitely acts as a facilitator. It also depends on the individual personality dimensions of the expatriate whether the new culture suits him for adaptability or not (Black, Mendenhall, Oddou, 1991; Mendenhall, Oddou, 2001; Furuya, Stevens, Bird, Oddou, Mendenhall, 2008; Caligiuri, 2000). Similar to pre-departure training, post-departure training also should be given equal importance. As expatriates will deal with real time issues in the host country, they will be able to relate to their training and this would help them settle with all their problems (Sims, Shraeder, 2004). The more they are associated with the company and understand the new culture, the less would be their problems. The sample in this study claimed that a meager 21% received post-departure training.

It is also proven through this study that as the expatriate travels more, the ability of spouse to adjust increases. If the expatriate prefers to travel more, the spouse should be adaptable, only then the work can accomplish. Other research studies have proven that inability of spouse to adjust is a foremost reason for an unsuccessful international assignment (Frazee, 1999; Sims, Shraeder, 2004; Jaffrey, David, 1996; Lee, 2007). Also, marital status and willingness to return to India are dependent on each other. When obligations increase, post marriage, the need to return back is also more. The study of this sample proves this view point. It is also found through this research that companies do not help much in relocating back to India.

SCOPE FOR THE FUTURE STUDY

The study focused on expatriates who had travelled to any foreign location. Future research could focus on country specific problems faced by expatriates. When employees travel to diverse culture, the acculturation process is very difficult. Considering Geert Hofstede's value dimensions, expatriates' experiences can be researched upon. Also longitudinal study could bring out more intensive problems faced during their assignment. Though literature is abundant on individual dimensions of problems, not many have given importance on the comprehensive outlook to the problems which can link one to the other.

CONCLUSION

Even though companies are supporting expatriates during their onsite assignments, still they are facing problems pertaining to adaptation and acculturation. It is the personal ability of the individual to be culturally sensitive and flexible in their country of operation. The study emphasized on the problems faced by the expatriates' family, job and cultural perspectives. The results showed that with the sample selected, the age and satisfaction with monetary benefits are dependent; there is a relationship between number of years of experience and pre-departure training given by the company; previous international experience and expatriates work satisfaction are dependent; there is a relationship between expatriates' preferring to travel abroad and the ability of spouse to adjust to the culture of foreign country; marital status and willingness to return to India are dependent. In spite of the problems faced, the study reveals that a whopping 80 percent would like to revisit the same country, if given an opportunity. This shows that expatriates still have the liking to visit places and explore them too. But, the family, job and cultural issues of expatriates are still prevalent.

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