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### **Improving U.S. Expatriate Success in Mexico: A Case Study Incorporating The Host Country Manager Perspective**

Iván C. López Morales

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IMPROVING U.S. EXPATRIATE SUCCESS IN MEXICO:  
A CASE STUDY INCORPORATING THE HOST  
COUNTRY MANAGER PERSPECTIVE

By

Iván C. López Morales

A Dissertation

Presented in Partial Fulfillment of Requirements for the

Degree of

Executive Doctor of Business Administration

in the

Crummer Graduate School of Business, Rollins College

2023

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2023

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The EDBA journey has been hard and frustrating but at the same time very rewarding. The theory behind an engaged scholarship program makes total sense but it is not an easy task given the centuries of tradition of academicians and practitioners not always operating in the same playing field. It is my hope that with every cohort that graduates we can expand the reach of the engaged scholarship concept for the benefit of academicians, practitioners, and society.

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## Abstract

Expatriate assignments are a main tool for multinational enterprises (MNEs) to open new operations and execute their strategies in international markets. However, such assignments are expensive and have a high failure rate (Johnson et al., 2006; Lin et al., 2012). Furthermore, the impact of failed assignments can result in significant negative impact beyond the assignment's direct cost. Mexico is one of the countries with the highest number of US expatriates (InterNations, 2022) partly due to its significant trade with the US. Most of the existing literature concentrates on how selection and training can improve the success of the expatriate throughout the expatriate journey from the perspective of the expatriate manager and the Multinational Enterprises (MNE) (Jones et al., 2014; Romero, 2002). US MNEs can greatly benefit from increasing the success of US expatriates. A case study methodology was used to study a US MNE operating in Mexico by interviewing host country managers that work with US expatriates. The context of the study is the US expatriate in Mexico, the case is the US MNE, and the unit of analysis is each interviewed host county manager in Mexico. This work aspires to expand existing theory and theoretical frameworks on expatriate assignment success by introducing the voice of the host country manager throughout the expatriate journey. The study has practical applications for MNEs trying to maximize their international expatriate investments to execute or advance their strategies and/or develop global managers.

*Keywords:* expatriate journey, host country manager, cross cultural training (CCT), family adaptation, candidate selection, repatriation, theory of met expectations, attribution theory, spillover theory, social exchange theory

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## **CHAPTER 1 INTRODUCTION**

Four decades ago, Baliga and Baker (1985) stated that, “in international business operations, managers must react positively to environmental factors because the consequences of failure are more drastic than in domestic situations” (p. 31). This statement becomes especially relevant considering the last few years’ events, such as the COVID-19 pandemic, for which no one was prepared. COVID-19 produced massive uncertainty that has affected and continues to impact the lives of many people around the world (Koveshnikov et al., 2022; Mello & Tomei, 2021). The pandemic has also resulted in significant strategic human resource challenges for firms, especially those with global operations (Bader et al., 2022; Lazarova et al., 2022; Mello & Tomei, 2021). Mello and Tomei (2021) have emphasized the importance of considering the impact of global changes such as COVID-19 on expatriate employees because “career concepts, adjustment processes, and job satisfaction differ for domestic and international assignees” (p. 6). For instance, recent literature has suggested that COVID–19 has more gravely impacted expatriate employees than host country nationals (HCNs) because of expatriates not having as many crisis response alternatives (Koveshnikov et al., 2022). At the beginning of the pandemic many expatriate assignees were faced with quarantine impositions and travel bans that forced them to stay locked in a foreign country, in some cases away from family and with a limited social network to rely upon (Koveshnikov et al., 2022). Others were forced to continue their

assignment from a location different than their assignment country. Research has estimated that over 50% of expatriate employees had to continue their assignment from home (Lazarova et al., 2022). Although the restrictions initially imposed as a result of the pandemic have eased, they have reshaped attitudes towards global work and employee mobility by both the expatriate employee and multinational enterprises (MNEs) (Koveshnikov et al., 2022; Lazarova, et al., 2022).

In the past, a global pandemic scenario was not taken into consideration for the design and preparation of expatriate assignments. The recent global pandemic scenario has highlighted the need to determine what happens to an expatriate when an economy closes, when movement between countries is suspended, when the physical support of having a host country office is no longer a factor, and when access to medical care is critical but restricted. For example, accessibility to COVID-19 vaccines in assignment countries has underlined the need for proper corporate infrastructure and/or standard operating procedures to enable and support expatriate work during an emergency of this nature. A year into the pandemic, some countries, including Mexico, had very limited availability to vaccines compared to the US (McClellan et al., 2021). The risk of contracting the virus and fear of isolation increased anxiety amongst expatriates (Sahoo et al., 2022). Once vaccination programs began to roll out, expatriates and their employers were confronted with yet another set of challenges as questions emerged about the timing, location, cost, and host country requirements for vaccination (Cartus, 2021). Sahoo et al. (2022) have called attention to the importance of the response measures of MNEs during such events to help preserve expatriate employee engagement, commitment, and enhanced performance. They have indicated that perceived lack of resources and support as well as

feelings of fear and anxiety negatively impact expatriates' level of engagement and ultimately their performance (Sahoo et al., 2022).

As the world experiences the beginning of a new chapter, opportunities exist for organizations and their leaders to break away from old ways of doing business. In their assessment of COVID-19 as a moderator of de-globalization, Mahaboob and Khan (2021) referred to the predictions of influential individuals like Henry Kissinger about the pandemic changing the globe forever and ending globalization altogether. For example, US firms may move from globalization to regionalization in international business (Witt, 2019), which may translate into an increased demand for expatriate managers and leaders with international experience. Legge and Lukaszuk (2021) have further argued that international business is evolving into a more regional model with a virtual component. These examples demonstrate that COVID-19 has changed the landscape of how international business is conducted, pushing MNEs to rethink how and where global work is and will be conducted.

The business world has also seen the technological advances brought on by Industry 4.0, known as the Fourth Industrial Revolution (Chiarini et al., 2020). Industry 4.0 includes technological advances such as artificial intelligence, virtual reality, augmented reality, digitalization, and advanced virtual videoconference and collaboration capabilities, which have all redefined the ways businesses engage virtually. Transformational events like the COVID-19 pandemic have accelerated the adoption of Industry 4.0 technology (Lazarova et al., 2022) and have significantly disrupted supply chain distribution, resulting in the adoption of economic models more aligned with regionalization or nearshoring of operations (Kurecic & Hatlek, 2021; Mahaboob & Khan, 2021). Industry 4.0 changes may be propelled further by regulatory requirements, security concerns, and competitive forces with the objective of more effectively

responding to different types of crises. While Industry 4.0 and COVID-19 are not necessarily expected to decrease the need for international expatriate assignments, their aftermath may transform how these assignments are structured and executed (Collings & Isichei, 2018; Lazarova et al., 2022). Lazarova et al. (2022) have indicated that global mobility might slow down because of the latest changes but will not be eliminated, noting that close to 90% of MNEs leaders intend to postpone but not abandon their international assignment programs. In fact, Sahoo et al. (2022) stated that almost all MNEs continued their expatriate assignments during the pandemic.

These trends may spark questions about the necessity for expatriate assignments, where “a suitable individual is assigned on a temporary basis, and subsequently returns to another position in the same company in the original country” (Inkson et al., 1997, p. 351) and about the availability and willingness of such individuals to go on an expatriate assignment. Research has suggested that when managing foreign subsidiaries and developing presence in new markets, a physical presence with personal interaction is critical to success (Brookfield Global Relocation Services [BGRS], 2021). It has been estimated that 98% of MNEs’ leaders believe that physical presence is essential for the implementation and execution of their company’s business strategy (Lazarova et al., 2022). However, this market-based need for expatriates juxtaposes the available pool of candidates. Andreason (2008) concluded that the increase in the aging population as well as dual income households decreases the attractiveness of international assignments for many candidates. Accordingly, a 2019 survey on employee mobility found that family or personal reasons and spouse/partner career related issues are the two top reasons for candidates to decline expatriate work (Cartus, 2019). Koveshnikov et al. (2022) highlighted that COVID-19 has further accentuated the challenges to be considered as part of an international



assignment. In their 2022 article, Koveshnikov et al. concluded that expatriates have experienced extraordinary stress during the pandemic. They explained that the increased anxiety caused by COVID-19 has influenced the level of motivation and commitment of some expatriates to international assignments, which can result in a desire for repatriation and a decreased pool of candidates interested in international assignments (Koveshnikov et al., 2022). Simultaneously, COVID-19 forced the implementation of existing and innovative technologies to enable remote work. Lazarova et al. (2022) have argued that the use of virtual technology during the pandemic has changed the individual preferences of employees with respect to the willingness to travel for work. They noted that in a 2021 survey of 200,000 employees from 190 countries, most employees indicated their interest to work from home has increased, at least partially, with 25% indicating that they want to work from home full time (Lazarova et al., 2022).

These challenges heighten the importance of understanding factors that influence the success of expatriate assignments. Given the current speed of business transformations, the need to sustain a competitive advantage, and the probability of regionalization and/or nearshoring, the support provided by expatriate managers to execute MNEs home country strategies abroad and to transmit on the ground technical expertise will become more critical in the years to come.

### **Economic Framework**

As of 2021, the US GDP was valued at \$23 trillion (US Bureau of Economic Analysis [BEA], 2022a) with exports of goods and services for international business representing over 10% of total GDP (Carter, 2022). In addition, the 2021 US cumulative investment in foreign countries was estimated at \$6.5 trillion representing a \$403.3 billion increase from the previous year (BEA, 2022b). These statistics substantiate that international business is a vital component

of the US economy. The impact of US conducting international business also has global repercussions given that US MNE parent companies and their foreign affiliates are responsible for over 43 million jobs worldwide (BEA, 2022b).

Mexico and Canada are among the top five countries for employment abroad by MNEs foreign affiliates (BEA, 2022b). Canada and Mexico account for one-third of the total US exports (Chatzky et al., 2020). In 2020, the US signed the latest trade agreement with Mexico and Canada to continue developing and expanding trade among the three nations. The United States-Mexico-Canada Agreement (USMCA), signed on July 1, 2020, replaced the North American Free Trade Agreement (NAFTA), and is expected to not only preserve the free trade initiatives already established under NAFTA but to update the supply chain arrangements amongst the participating countries and enhance interconnectedness by establishing digital trade rules (Lytle, 2020). The expected result is a \$68.5 billion injection to the US economy and an enhancement to the manufacturing and agriculture industries in all three countries (Lytle, 2020).

Mexico is one of the largest US goods trading partners with total business estimated at \$614.5 billion in 2019 (U.S. Trade Representative, n.d.). The multiple trade sectors in Mexico offer exceptional opportunities for US businesses, including agriculture, automotive, industrial materials, aerospace and defense, and energy (International Trade Administration, 2022; Lytle, 2020). Several of these sectors, as well as the financial services, electronics, and telecommunications sectors, received large amounts of foreign direct investments (U. S. Department of State, 2022). “In 2021, the US investments made in Mexico were valued at approximately \$100.68 billion US dollars” (Statista Research Department, 2022, para 1). The attractiveness of Mexico as a US trading partner is attributed to several factors including the two nations sharing almost 2,000 miles (about 3,220 km) of land border, Mexico’s growing consumer

base, and the country's increasingly skilled and relatively less expensive labor force (U.S. Department of State, 2022).

Connecting these global trends in business and society, this work aspires to shed light on how companies can improve the success of US expatriate assignments in Mexico using a case study methodology with the participation of two host country managers working in the same company. The research incorporates the perspective and participation of host country managers working with expatriate managers, a perspective that is typically absent in the international expatriate manager's literature, where the concentration is on the expatriate manager, the HR department, and the company's expatriate program. The company selected is in the private sector and the host country manager (HCM), as well as the expatriate manager, are both in a management role. The focus is on the host country managers working with the expatriate managers and not necessarily technical experts or individual contributors. Several of the recommendations apply to the global context and others are more applicable to Latin American countries or mainly to Mexico. Including the perspective of the host country manager in the development of an expatriate assignment can be applied in the global context. See Table 1 for a list of the major constructs used throughout this study.

**Table 1**

*Constructs*

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Expatriate assignment – “the initiative for the international experience comes primarily from a company which operates internationally. A position may become available in a subsidiary outside the country in which the company is based. The job requires both knowledge of the company’s strategy, procedures, etc., And the ability to work and live successfully in a foreign environment. A suitable individual is assigned on a temporary basis, and subsequently returns to another position in the same company in the original country.”	(Inkson et al., 1997, p. 351)
Expatriate manager - “the expatriate manager or the international manager is defined, in a narrow sense, as an executive in a leadership position that involves international assignments.” “The term ‘expatriate (or international) manager’ defines an executive who is able to assume a leadership position fulfilling international assignments across countries and cultures.”	(Pucik & Saba, 1998, p. 40, p. 41)
Parent country nationals (PCNs) or home country nationals – “are defined as employees of the MNE who are citizens of the country where the MNE’s corporate headquarters is located”	(Tarique et al., 2006, p. 209)
Host country nationals (HCNs) - “are locals from the host country/culture where the MNE operates.”	(Fee & Michailova, 2021, p. 684)

---

**Table 1**

*Constructs*

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<p><b>Selection</b> - “A selection paradigm entails, at the very least, the identification of (1) variables or factors that are crucial to the success on the job; (2) relationships between these different set of variables, and (3) the weight that should be assigned to each factor in a given situation. It is especially crucial to identify the latter, because assignments, and hence selection, vary on the bases of the tasks to be performed and the environment to which the individual is sent.”</p> <p>“The selection process should attribute varying levels of importance to the factors that contribute to the success or failure of the job. Therefore, approaches for selection should be contingent on the nature of the job, the personality characteristics of the expatriate candidate, and the culture of the host country.”</p>	<p>(Wang et al., 2002, p. 71)</p> <p>(Katz &amp; Seifer, 1996, p. 41)</p>
<p><b>Cross Cultural Training (CCT)</b> – “Has generally been defined as any intervention designed to increase the knowledge and skills of expatriates to help them operate effectively in the unfamiliar host culture.”</p>	<p>(as cited in Caligiuri et al., 2001, p. 358)</p>
<p><b>Repatriation</b> – “In general, the return to the home country (repatriation) represents the final phase of an international assignment for the vast majority of expatriates, a phase, however, that can be as disorienting and frustrating for employees as the actual international assignment.”</p>	<p>(as cited in Knocke &amp; Schuster, 2017, p. 276)</p>
<p><b>Expatriate assignment success</b> – Performance objectives are met, adaptation of expatriate and accompanying family occurs, and a successful repatriation gets executed.</p>	<p>(Littrell et al., 2006)</p>
<p><b>Expatriate assignment failure</b> – “The inability of the expatriate or repatriate to perform according to the expectations of the organization”. Performance not achieved, adaptation to host country fails, and/or repatriation not completed successfully.</p>	<p>(Harzing and Christensen, 2004, p. 622)</p>

---

## **Gaps in the Literature**

There is a demand for managers that can operate successfully in foreign environments to advance MNEs strategies (BGRS, 2021; Rios, 2021; Tung, 1982). This need has sparked the curiosity of academics who, over the years, have researched the expatriate process and performance within the context of MNEs international strategies. However, upon review of the literature on expatriate assignments, an important gap in the literature was identified. This omission relates to identifying and understanding the factors that may increase the success of an international assignment journey from the perspective of the host country manager working with the expatriate manager (Mahajan & De Silva, 2012). HCNs have an important role to play in the success of MNEs in foreign countries (Michailova et al., 2022). Fee (2020) has indicated that, “the experiences of organizations and individuals that host expatriates have been sorely overlooked” (p. 330). Cross-cultural management research points to the key role of HCNs in expatriate acculturation and adjustment (Mahajan & De Silva, 2012). However, most of the existing literature on expatriate assignments is expatriate centric and addresses and/or proposes home country solutions to expatriate performance issues from the MNEs perspective (Fee, 2020; Fee & Michailova, 2020). Considering that “host organizations manage expatriates on a day-to-day basis and assume primary responsibility for decisions about how best to capture expatriates’ knowledge and skill” (Fee & Michailova, 2020, p. 330), expatriate assignment research would benefit from better understanding the perspective and contribution of HCNs to the expatriate journey.

Most expatriates are accompanied by family during their assignments (Cole, 2011) and all family members face adaptation challenges of different degrees. Spouses typically have a more difficult adaptation challenge than the expatriate or their families (Andreason, 2008). The

literature recognizes the expatriate manager and/or family adaptation as one of the main reasons for expatriate failure (Littrell et al., 2006; Rios, 2021; Tan et al., 2021), but there is a gap in the literature as to when and how they should be included in the expatriate journey.

This study's objective is to make recommendations to improve the success of US expatriates (home country) working in Mexico (host country) by incorporating the host country manager perspective, including their views on spouse family participation in the expatriate journey. To address these gaps and achieve the stated objectives, this dissertation is organized as follows. Chapter 2 highlights the practitioner's challenge including the research questions, a review of the expatriate literature, a discussion on US expatriates in Mexico literature, a brief discussion of theoretical considerations, propositions, and concludes with the introduction of the research methodology selected. The expatriate literature review concentrates on the expatriate journey, defining success/failure of expatriate assignments, and the role of HCN in the expatriate assignment. Chapter 3 discusses the case study methodology and its application to the present research. Chapter 4 presents the analysis performed with corresponding findings. Chapter 5 presents conclusions, managerial implications, limitations, and areas of future research opportunities.

## **CHAPTER 2 LITERATURE REVIEW**

This chapter begins by establishing the practitioner's challenge and research questions, followed by a review of the current literature on the topic, the proposed applicable theories, propositions, and the rationale for the methodology selected.

### **Statement of the Problem as Practitioner's Challenge and Research Questions**

The main objective of engaged scholarship is to build a bridge between the academic and practitioner worlds (Van de Ven & Johnson, 2006). Society benefits from the application of academic learnings to practical business challenges and from practitioners collaborating with academicians to further knowledge and theoretical development. One motivation for practitioners to support and participate in academic research and theoretical development is for the academic agenda to explore solutions to real business challenges thus making academics and practitioners coproducers of knowledge (Van de Ven & Johnson, 2006)

In this dissertation, the academic problem and study subject align with the practitioner's challenge, which is to identify the factors that can have significant impact on improving the success of US expatriate assignments (home country) in Mexico (host country). This challenge is analyzed from the point of view of the host country manager working with the expatriate manager. The outcomes of this research may be taken into consideration in the development and implementation of US expatriate assignments in Mexico, specifically, and other expatriate



journeys in general. Based on findings presented here, US corporations could identify opportunities to positively influence the success of expatriates. Learnings from responses to the COVID-19 pandemic and Industry 4.0 may also provide opportunities for increased operational effectiveness and financial optimization. With these challenges and practitioner needs in mind, research questions under consideration for the present research are:

RQ 1. Why and how can Mexican host country managers contribute to the success of US expatriate managers in each stage of an expatriate journey?

RQ 2. How does a Mexican host country manager define an US expatriate manager's assignment success or failure?

RQ 3. What preparation did the managers (host and expatriate) and the expatriate family expect for themselves and how were the expectations (not) met?

RQ 4. What is the perspective of the Mexican host country manager on the inclusion of spouse and family in the selection, training, and repatriation stages of an US expatriate assignment?

### **Expatriate Assignments**

As the world economy transitioned towards globalization, corporations increased the use of expatriates to implement their strategies (Tan et al., 2021). MNEs design international assignments to serve and advance a variety of strategic objectives, for instance enter a new market, help develop management competencies in the host country, transfer technological and technical skills knowledge, and disseminate corporate culture, among others (Bennett et al., 2000; Lin et al., 2012). As effective expatriate programs became critical to international success (Porter & Tansky, 1999) research to understand factors that influence the expatriate's performance became of utmost importance (Lee, 2007). Specifically, the failure of expatriate

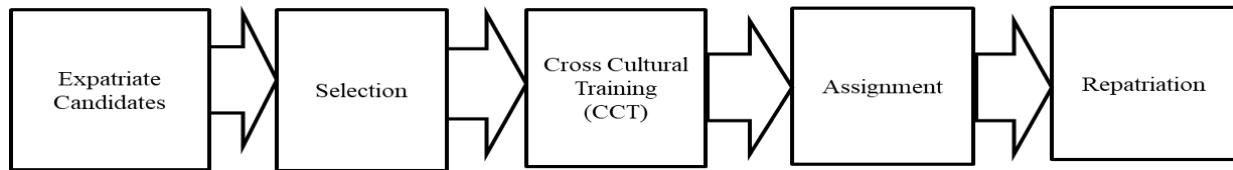
assignments has been the subject of study for decades (Harzing & Christensen, 2004; Lee, 2007; Tan et al., 2021; Tung, 1982). The driving forces of these studies have been the high cost of expatriate assignments and the less than stellar success of expatriate assignments. Some corporations mistakenly operated under the assumption that high performers at home would be high performers in any location and that technical experts would perform well in different locations.

### ***International Expatriate Program Stages***

This study inquires about the expatriate manager's journey through the different stages of an international assignment (Figure 1) from the host country manager working with the expatriate perspective. An expatriate assignment journey begins with the selection of the candidate, ideally followed by pre-departure training, the expatriate's deployment to the host country, and the subsequent repatriation and reintegration of the expatriate manager to the home country (Collings & Isichei, 2018; Tahir & Egleston, 2019). Repatriation "represents the final phase of an international assignment for the vast majority of expatriates, a phase, however, that can be as disorienting and frustrating for employees as the actual international assignment" Breitenmoser & Berg, 2017, as cited in Knocke & Shuster, 2017, p. 276). In the present study, host country refers to the location where the international assignment will take place (e.g., Mexico) and home country to the company location where the expatriate manager is coming from (e.g., US). Each stage of the process plays a role in influencing the performance of an international expatriate assignment.

**Figure 1**

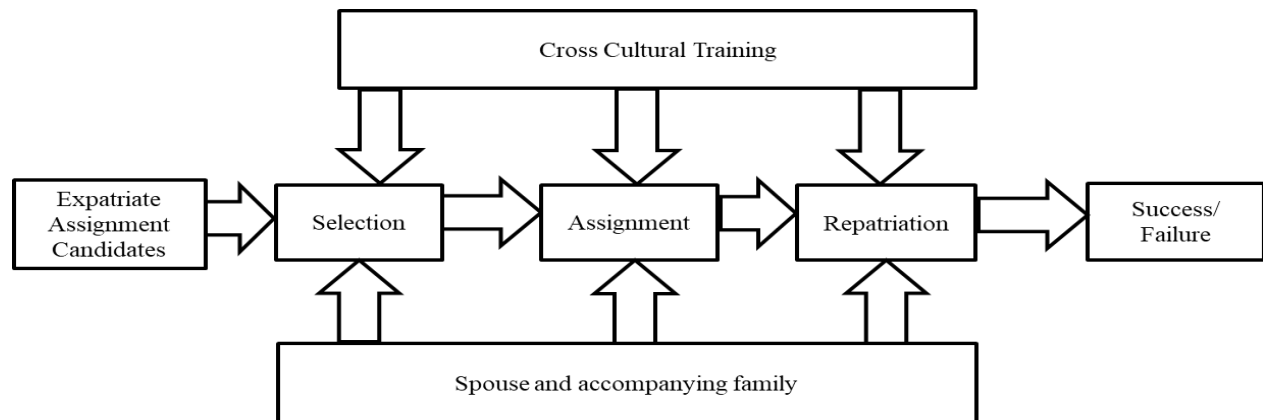
*Expatriate Journey*



A review of the literature indicates that MNEs expatriate programs concentrate in the first two stages of an expatriate journey (Figure 1), selection and training, as their foundation to influence the success of expatriate assignments (Jones et al., 2014; Katz & Seifer, 1996; Mendenhall & Oddou, 1986; Porter & Tansky, 1999; Romero, 2002). This sentiment is reflected in research that concludes that “a human resource system capable of selecting and training globally competent employees must be properly implemented to assure organizational success” (Feitosa et al., 2014, p. 135). The inadequacy of corporations to properly design expatriate journey processes and adjust them to the candidate is a major factor in failure rates (Pucik & Saba, 1998). Considering the stages of the expatriate journey, from selection to repatriation, and the tools used to influence success of the expatriate assignment, several studies pose the questions: at what stage should cross-cultural training (CCT) be provided and who should participate in the selection and training stages, see Figure 2 (Bennett et al., 2000; Celaya & Swift, 2006; Cole, 2011; Fee & Michailova, 2020; Gupta et al., 2012; Katz & Seifer, 1996; Mendenhall & Oddou, 1986; Porter & Tansky, 1999). Based on this preponderous of research and unresolved questions, Figure 2 suggests spouse and accompanying family should be included across each of the expatriate journey stages.

**Figure 2**

*Expatriate Journey Literature*



*Expatriate Assignment Candidates*

Some companies hire host country nationals (HCNs) with prior academic, professional and/or living experience in the US (i.e., home country), while other companies hire qualified HCNs to initially work in their US operations prior to going back to work in their country of origin (Lenartowicz & Johnson, 2007). Once host country managers are acculturated and exposed to the job and performance expectations of the home country, they can return to their country to execute the assignment in alignment with home country parameters. In theory, these managers would have minimal need for cultural adjustment, no language barriers, a better chance of a warm reception from their peers and may represent a more cost-effective option for the company (Lenartowicz & Johnson, 2007; Pérez & Pla-Barber, 2005). HCNs would be less expensive (Lenartowicz & Johnson, 2007) since they are not expected to receive full expatriate compensation packages. HCNs are usually not paid on an expatriate salary scale; they do not need relocation expenses, cultural training expenses or extraordinary family benefits geared towards supporting a family transition (Lenartowicz & Johnson, 2007).

Other companies may select candidates from their home country's current labor force, irrespective of their origin, international culture exposure or expatriate assignment experience for international assignments. Such individuals are referred to as parent country nationals or PCNs. Selecting a PCN with host country experience is also assumed to minimize the impact of an adjustment period and the need for acculturation. Additionally, these employees may be more open to considering other expatriate assignments.

Another option for companies is to hire third-country nationals (TCNs), someone who has neither the home or host country cultural tendencies; an alternative that is often considered to be less expensive as it deploys a more neutral individual who can assist in culturally connecting HCNs and PCNs (Goralski & Salgado, 2014). In selecting a TCN, the MNE would be fostering an international resource that could be deployed to different countries assignments or work in the home office as a manager with a global mindset. However, HCNs and TCNs could present higher loyalty challenges than PCNs due to the limited expatriate manager resources in some countries and the aggressive hiring practices from competitors (Lenartowicz & Johnson, 2007). Goralski and Salgado, (2014) have suggested that the inclusion of all three types of candidates (HCNs, PCN, and TCNs) in a suitable or appropriate fashion impacts performance in several areas and aids in the dissemination of cultural knowledge. This study focuses on the experience of US PCN expatriates who have been assigned to Mexico.

### ***Cost of Expatriate Assignments***

Managers with international expatriate assignment experience are a scarce but valuable resource. Expatriate managers could become the basis of a competitive strategic advantage for their company depending on the type of industry and the robustness of the corporation's expatriate manager program (Barney, 1991; Gupta et al., 2012; Lenartowicz et al., 2014).

International expatriate assignments require a significant investment (Johnson et al., 2006; Baliga & Baker, 1985; Katz & Seifer, 1996; Lin et al., 2012) and their failure rate is estimated between 40% to 55% (Black et al., 1999; Chan et al., 2021). There are many factors contributing to such high failure rates and those reasons are not limited to work-related conflicts (Wang & Varma, 2019). The cost of international assignments is estimated to be three to five times that of the expatriate compensation (Bennett et al., 2000) and the cost of failure is much higher (Feitosa et al., 2014; Johnson et al., 2006).

Considering the literature reviewed above, one may ask: are expatriate assignments too expensive? As expected, there is no easy or simple answer to this question. The relative cost of the assignment depends on how companies manage their expatriate program, the scope of the assignment, and the overall success of the expatriate assignment. In their 2005 article, Pérez and Pla-Barber (2005) attempted to use transaction cost economics (TCE) to calculate the cost of an expatriate assignment against the alternative of a local hiring. The study was conducted among Spanish companies using a postal survey. Some of the factors considered in the evaluation included selection, training and performance evaluation costs. The independent variables measured in the study included level of foreign expansion, degree of technological innovation, international strategy, and cultural distance. The authors concluded that under certain conditions expatriates could be a cost-effective solution, for example, when a company has a lower level of international expansion or lower degree of technological innovation.

### ***US Expatriate Assignments***

US corporations depend on US expatriate managers to provide accountability, control, technical expertise, leadership, and home company cultural knowledge to execute their strategies in addition to helping develop talent with international experience (Romero, 2002; Bennett et al.,

2000). An international manager is defined “as an executive in a leadership position that involves international assignments” (Pucik & Saba, 1998, p. 40). In one of the most recent data points found, Fisher et al. (2007) estimated the number of expatriates from US companies to be approximately 150,000.

As per a 2021 expatriate survey, US expatriates are 47.8 years old on average, which makes them older than the global average expatriate population of 45.9 and are well-educated, with over 90% of them having at least a bachelor’s degree (InterNations, n. d.). The most common host country destinations of US expatriates' assignment are Mexico, Germany, Italy, China, and Japan (InterNations, n. d.). Mexico has typically been a major destination for US expatriates (InterNations, 2022). A 2022 survey conducted among 11,970 expatriate respondents working in 181 countries found Mexico to be the overall top choice destination. The country was ranked number one in the friendliness and personal support categories and second in the personal finance and work-life balance categories (InterNations, 2022). Although Mexico has many attractive characteristics over other countries for expatriate work, the destination also represents a challenge in terms of security and health services (InterNations, 2022).

### **Influences on Success/Failure of Expatriate Assignments**

In their review of expatriate literature, Littrell et al., (2006) noticed that in a significant portion of the applicable literature, failure is defined first, and success is implied to be the lack of failure. However, success and failure of an international assignment are not consistently defined in the literature. Littrell et al. (2006) noted this inconsistency and highlighted the need for academicians to agree on consistent definitions of failure and success for researchers to be able to compare results and advance knowledge in the expatriate managers’ field. The most common and simplistic definition is to characterize failure as early or premature repatriation (Edmond,

2002; Lee, 2007; Tung, 1982). This definition is very limiting and not granular enough to allow researchers to expand knowledge on the topic and develop theoretical frameworks (Johnson et al., 2006; Lee, 2007). Harzing and Christensen (2004) have argued that failure is “the inability of the expatriate or repatriate to perform according to the expectations of the organization” (p. 622). Romero (2002) has stated that in up to 50% of the completed assignments, managers have performed below expectations. Incorporating performance into the definition of failure would, most likely, translate into a higher number of failed expatriate assignments.

While expatriate assignment success has been typically defined as lack of failure, recent literature expands the definition to include achieving the objectives originally agreed on at the beginning of the assignment, adaptation of the expatriate and his family to the host country, and the successful repatriation of the manager among other components (Littrell et al., 2006). Repatriation includes successfully reintegrating the manager to the home country as well as sharing the lessons learned with the organization (Knocke & Schuster, 2017). Regretfully, another challenge of expatriate programs is the large number of expatriates that depart their organization within two years of repatriation (Littrell et al., 2006). Johnson et al. (2006) mentioned a 22% attrition rate in the first two years after repatriation. Logic would suggest that repatriated managers should become important assets to the organization given their international experience (Oddou et al., 2013; Szkudlarek & Sumpter, 2015) and the significant investment made by the company, thus their quick departure from the firm should signal a lack of success for the assignment. Ultimately, having a strong, successful expatriate program could become an integral component of a company’s strategic competitive advantage. The main tools identified in the literature to increase expatriate success are being discussed next.



### *Selection of Expatriate Candidates*

The first stage of an expatriate program is the selection process (see Figure 1). In any international expatriate assignment, matching the project with the right person is a key to success (Tan et al., 2021, 2020; Wang et al., 2002; Wang & Varma, 2019) since the literature points to poor candidate selection as a leading cause for expatriate manager failure (Lee, 2007; Littrell et al., 2006; Wang et al., 2002; Wang & Varma, 2019). Rios (2021) highlights selection and family issues as the key reasons for international assignment failures. The selection process cannot be exclusively based on technical expertise and performance in the home country (Fisher et al., 2007; Wang et al., 2002). Nevertheless, some corporations operated and still operate under the assumption that high performers at home would be high performers in any location and that technical experts would perform well in different locations. In 1999, Black and Gregersen discussed the practices for expatriate candidate selection that specific companies followed with great success. In the article, the authors summarized tools used by Honda, Monsanto, Disney, LG, Colgate-Palmolive, and GE, among others, and attributed success of their expatriate assignment processes to three common practices: (a) focus on knowledge and the development of global leadership, (b) expatriate assignment paired with individuals with technical skills similar to or better than cross-cultural abilities, and (c) a well-thought repatriation process (Black and Gregersen, 1999).

The expatriate manager's inability to perform is not the only reason for failure. Pucik and Saba (1998) have suggested the existence of individual as well as organizational reasons for failure of the expatriate assignment. The individual reasons for an expatriate to fail their assignment could be related to personality and behavioral issues, family inadaptability, and level of commitment to the assignment, among others (Katz & Seifer, 1996; Porter & Tansky, 1999;

Pucik & Saba, 1998). Harvey and Novicevic (2002) have proposed including skills of intuitive and creative intelligence as an important part of the selection process. Intuitive intelligence is defined as “the ability to gain quick insights into how to make decisions, frequently referred to as “street smarts” (Harvey & Novicevic, 2002, p. 132). Creative intelligence refers to the ability to perceive business ideas in a different way than previously conceived by others (Harvey & Novicevic, 2002)

Even when the literature recognizes the lack of host country adaptation as a leading cause of premature return, a substantial number of international companies do not include the spouse in the selection process (Andreason, 2008). The literature also recognizes the important influence that the spouse adaptation exercises over the expatriate adaptation (Littrell et al., 2006). More empirical research is needed to determine how to identify those expatriate candidates with the best probability of executing a successful assignment.

### ***Cross-Cultural Training/Assistance***

The second valuable tool for expatriate success rate is training or assistance. Training or assistance can be conducted as part of the preparation for the assignment (pre-departure training), during the assignment, during repatriation, or all the above (Littrell et al., 2006). Littrell et al. (2006) have argued that the best-case scenario is to have a training program that continues throughout the assignment. The most common training defined in the literature as very encompassing is cross-cultural training (CCT).

The main objective of CCT is to increase cultural knowledge and facilitate the rapid adjustment of the expatriate employees and their families to the host country (Elvis et al., 2020). CCT is defined as “any intervention designed to increase the knowledge and skills of expatriates to help them operate effectively in the unfamiliar host culture” (Brewster & Pickard, 1994;

Harris & Brewster, 1999; Kealy & Protheroe, 1996; Shumsky, 1992, as cited in Caligiuri et al., 2001, p. 358). This definition can be expanded to include not only the expatriate but also the spouse/significant other and accompanying family. The expatriate manager must balance the home country culture with the host country culture to adjust to the expatriate engagement (Fisher et al., 2007). In 2002, Vance and Paik explored the concept of a one size fits all pre-departure expatriate training and concluded that programs need to be tailored or at least adjusted to the host country characteristics and furthermore should include input from the HCNs. Specific adjustments to CCT could be made depending on the host country and the specific cultural distance.

Given the singularity of each assignment and the personal characteristics of an expatriate candidate, companies should consider adjusting or tailoring the CCT to each situation to maximize the positive relation to performance (Littrell et al., 2006; Morris & Robie, 2001; Tan et al., 2021). Johnson et al. (2006) highlight the importance of cross-cultural competence (CC) as an important ingredient for success in an international assignment. They defined CC in the international business context as “an individual’s effectiveness in drawing upon a set of knowledge, skills, and personal attributes in order to work successfully with people from different national cultural backgrounds at home or abroad” (Johnson et al., 2006, p. 530). Their contribution to this definition was the incorporation of the element of performance or action based on the existing or acquired knowledge that should be taken into consideration in the selection and training phases of the expatriate journey. An expatriate training program must be timely, all-inclusive, detailed oriented, and must not be a mere formality (Celaya & Swift, 2006; Littrell et al., 2006). Lenartowicz et al. (2014) state the MNEs must use different CCT methods to advance tacit and explicit knowledge using cognitive and behavioral experiences. In their

meta-analysis, Morris and Robie (2001) cautioned practitioners that the effectiveness of CCT can be overestimated and called for further research.

Academic researchers mostly agree that pre-departure training potentially increases the degree of success of an expatriate assignment (Kassar et al., 2015, as cited in Elvis et al., 2020). Further academic work is needed to clearly understand the impact of CCT (Lee & Croker, 2006). Even when the literature recognizes the positive effect that CCT can have in the success of expatriate assignments, corporations do not appear to be convinced given their lack of CCT investment or adoption (Lenartowicz & Johnson, 2007). The literature tends to indicate that many companies do not invest in pre-departure training and, when they do, the financial resources dedicated to the training are limited (Celaya & Swift, 2006). A significant number of corporations provide limited or no training to potential expatriates (Daher, 2015). Elvis et al. (2020) have argued that cross-cultural training is not a general notion among MNEs because most companies are not convinced of the effectiveness of such training. According to Katz and Seifer (1996) and Tung (1982), some US corporations have argued that pre-departure trainings can be too expensive, ineffective, that there is too short time between selection and the assignment, and candidates have shown dissatisfaction in the past. Only 30% of the managers selected for expatriate assignments are provided any kind of training before or after the assignment (Erogul & Rahman, 2017). Celaya and Swift (2006) mentioned that 40% of US expatriates receive no CCT and that the remaining 60% received only a few hours.

Littrell et al. (2006) performed a 25-year literature review on cross-cultural training research, concluding that the history of CCT training goes back to the 1960s but there is a current need for further analysis. Specifically, Littrell et al. (2006) have stated a need for more empirical work to properly measure the effect of CCT and the influence of moderators to improve

expatriate performance. The authors also call for more theoretical framework developments that tie to empirical work. Specific literature regarding US expatriates in Mexico is discussed later in this chapter.

### ***Impact of Language***

One basic component of most CCT is language training. Language skills can help in the acculturation, communication, and comprehension aspects of an expatriate assignment (Selmer & Luring, 2015). Language skills may become less important in the business setting where MNEs have a common language in their operations but remain a skill that helps in the communication and adaptation to the culture and social scene in the host country. However, language has become more impactful in technical roles than in managerial roles where the home country language may be spoken often (Andreason, 2008). Proficiency in the host country's language facilitates communication, integration, and understanding but does not guarantee adaptation (Selmer & Luring, 2015). More research should be performed to further validate these informed assumptions and to expand knowledge of language proficiency in areas such as work performance. (Selmer & Luring, 2015). In the present study's context, practitioners might find it useful to understand the impact of proficiency in Spanish on the performance of expatriates in Mexico from the perspective of the host country manager.

### ***Spouse/Significant Other and Accompanying Family***

An important component of the expatriate experience is family adjustment, as in many cases employees belong to a family unit at the time of the assignment and expect to bring their family overseas. In this context, a family member is anyone accompanying the expatriate manager to the assignment's host country. Cole (2011) indicated that approximately 2/3 of expatriates are accompanied by spouse/significant other or some family member. In a 2021

survey, 62% of the US expatriates interviewed stated that they are in a relationship (InterNations, n.d.). Family members have an important role in influencing the expatriate's performance (Andreason, 2008; Tung, 1982). The spouse/significant other and/or accompanying family will experience an adaptation process to the new family life, host country culture, and expatriate work environment. An important percentage of international assignment failures is attributed to spouse or family adaptation challenges (Littrell et al., 2006; Tan et al., 2021). In general, MNEs and expatriate families underestimate adaptation challenges during the expatriate journey (Lazarova et al., 2022). Andreason (2008) stated that spouses have a bigger adaptation challenge than either the expatriate, who invests a significant time at work, or the children, who engage in the routine of a school system even if different than the one in the home country. However, it is estimated that only 18% of corporations extend training to the family of the expatriate (Čuhlová & Yar, 2018).

Spouses and significant others that are part of a dual income household in the home country may face the challenge of not working in the host country and slowing down their professional career. Spouses and significant others leave behind family and social support networks and need to build new networks in a different country. Family members experience similar challenges and must adapt to a new environment. For example, kids will attend a new school with a different school system and need to build new social networks. Children who actively participate in a sport or activity may not have the same opportunity in the new environment. Mello and Tomei (2021) have stated that it is not only important to take the spouse into consideration during the selection and training processes, but that other family members should be included as well. Their research has also highlighted that accompanied expatriates are much more likely to successfully adapt to a new environment (Mello & Tomei, 2021). Within

the present literature review, no significant empirical work was found to measure the expatriate's performance and assignment success when including spouse and family members in the selection and training process.

In 2011, Cole reported that females represented about 20% of the US international expatriates. Recent data from InterNations (2022) indicate a larger female participation in expatriate assignments. A significant portion of those females are in relationships and a significant number of those spouses or partners have jobs. In some cases, managers do not pursue or accept an international expatriate assignment because their partners will have no job in the host country, or their career progression will be negatively impacted in the home country. "Over 90% of female expatriates in one study said that the success or failure of their international assignment was directly related to the happiness of their spouse" (Linehan, 2002, as cited in Cole, 2011, p. 1506). In addition, there is preliminary data suggesting that male spouses have a harder time adjusting to the host country than female spouses (Cole, 2011). Based on these findings, it seems that US corporations must adapt to the current household environment and respond to its needs to increase the probability of success of expatriate assignments. Given the changes in family structure over the past decades (Pew Research Center, 2015), US MNEs would be wise to consider new forms of family compositions that may not be recognized, may be rejected, or could be illegal in the host country. This adaptation in training needs to include support for the spouse who plans to continue working while abroad or that needs to integrate into the host country's society.

## **The Role of Host Country Nationals in Expatriate Assignments**

Host country national (HCNs) “are locals from the host country/culture where the MNE operates” (Fee & Michailova, 2021, p. 684). In most MNEs, HCNs represent the majority of the employees (Michailova et al., 2022). In the context of this study, the HCN of interest is the host country manager who works with the expatriate manager. As part of the expatriate assignment, the expatriate typically interacts more intensely with a few HCNs. These HCNs may have a different perspective from the expatriate on the work and non-work situations the expatriate will encounter and experience. HCNs have a culturally informed outlook on the challenges that expatriates will face throughout the assignment. In a study that included 30 Vietnamese organizations, Fee and Michailova (2020) observed the active role of HCNs in the preparation and execution of professional and socialization programs assisted expatriates in the process of adaptation to their new position. They pointed to the positive influence of the host country manager on the expatriate journey. Sahoo et al. (2022) stated that HCN support indirectly influences expatriate manager performance. Chan et al. (2021) have considered HCNs a very important part of the expatriate support network. No literature was found taking an integrated approach on the impact that host country managers could have in each stage of the expatriate journey.

### **Literature on US Expatriates in Mexico**

There is a considerable amount of literature about expatriate managers in different countries. Nevertheless, literature about the expatriate management history and experience in Latin America, including Mexico, is not as abundant (Ruiz et al., 2013; Sargent & Mathews, 1998; Varma et al., 2020). In fact, management practices in Mexico have mostly been studied in



the scope of cross-national comparisons (Ruiz et al., 2013). Academic work in the US has focused on finding US management models that may work in Mexico (Ruiz et al., 2013).

### *Differences in National Culture Dimensions*

Baliga and Baker (1985) wrote about cultural and human empathy claiming that, “the manager must understand the local work ethics and respect them rather than flaunt them” (p. 31). With this perspective in mind, the role of culture in the success of US expatriates in Mexico becomes particularly evident when considering the difference in scores between Mexico and US as per Hofstede’s cultural dimensions (Hood & Logsdon, 2002; Katz & Seifer, 1996). The US ranked, and continues to be perceived, as a highly individualistic culture, while the Mexican culture imposes more value on collectivism (Najera, 2008; Sargent & Mathews, 1998). In the power distance as well as the uncertainty avoidance dimensions, Mexico scores high and the US low (Hood & Logsdon, 2002; Katz & Seifer, 1996). Other studies investigating attitude towards work, find Mexico places greater value on leisure than work, while the opposite for the US (Hood & Logsdon, 2002). The differences between the US and Mexico translate into different ways of managing business. For example, in the US, MNEs may put more emphasis on creating an individual competitive environment to achieve higher levels of performance (Ruiz & Hamlin, 2019). In Mexico, the work environment may translate into a more collective approach to goal setting and rewarding (Ruiz & Hamlin, 2019). In Mexico there is need for rules and clarity and ambiguity is not well received (Ruiz et al., 2013) while in the US ambiguity is less of a concern and organizational conflict may be seen as natural. As a of result of this, in Mexico it is important for employees to have clear norms that they can follow and avoid conflict (Ruiz et al., 2013). In Mexico, employee relationships are paternalistic (Littrell & Barba, 2013; Ruiz et al., 2013) with less tendencies to challenge superiors or complain about differences between levels

(Litrico, 2007; Ruiz & Hamlin, 2019), subsequently requiring US management to find other ways to solicit and receive feedback to better understand and avoid possible conflicts (Osland et al., 1999). In contrast, US employees are more assertive on discussing their concerns and disagreements with management.

Several studies have highlighted differences between the American and Mexican cultures (Litrico, 2007; Osland et al., 1999; Ruiz et al., 2013; Sargent & Mathews, 1998). Sargent and Mathews (1998) characterized the Mexican culture as being extremely loyal, sometimes to a fault; upholding core values, such as family and religion; expressing optimistic estimates that are perceived as good intentions; and leaning towards a relaxed punctuality. The researchers also found that, in general, Latin American cultures place significant value on interpersonal relationships and that the emotional components of such relationships represent a sharp contrast with other cultures such as US. While interviewing nationals from companies along the border, Sargent and Mathews (1998) found that some Mexican workers considered that expatriate managers lacked professionalism mainly because of the way they dressed and interacted with workers. In addition, the study findings suggested that Mexican managers resist and are resentful of what they perceive as cultural impositions. The expatriates' lack of understanding of the Mexican culture, including language, as well as what locals perceived as managerial style impositions have been identified in the study as the main reasons for conflict between expatriates and Mexicans. "We found that managing this duality--that is, the simultaneous rejection and acceptance of outside cultural differences and production models--is one of the keys to successful practice in the Mexican market" (Sargent & Matthews, 1998, p. 75).

Litrico (2007) provides examples of the apparent lack of urgency by Mexican workers culture and of *servile acceptance* when compared to US corporate. Servile acceptance refers to

some Mexican workers' tendency to say yes out of respect for hierarchy, but the "yes" reply does not necessarily mean that they agree to the request or instructions. This behavior translates into acknowledgement rather than agreement with the message. Some of the impressions have softened over time given the significant business interactions between the US and Mexico (Howell et al., 2007).

These findings are somewhat in line with what other expatriate management studies have suggested regarding cultural empathy and expatriate success (Ruiz et al., 2013). However, Ruiz et al. (2013) also highlight the importance of understanding similarities as well as the differences in perceptions between both countries. Some US management practices are well received and understood in Mexico, but others need a different approach in order to be effective. Further studies are needed to update results and capture perceptions by industry and regions in Mexico.

### ***US Expatriate Performance in Mexico***

In the most comprehensive study of US expatriates in Mexico (Edmond, 2002), the author concluded that it is common for international companies to have challenges while operating in Mexico. The study examined selection criteria, cross-cultural training, compensation, repatriation program, cultural background, and spouse's inability to adjust as individual-level independent variables, each having a direct relationship to expatriate failures as the dependent variable. The study found a 7% to 9% expatriate assignment failure rate over the years 1996 to 1998, which is significantly lower than the 20% to 40% expatriate assignment failure rate reported in other studies (Chan et al., 2022; Johnson et al., 2006; Lin et al., 2012). However, Edmond (2022) used premature return of expatriate to define failure, which does not include a performance component or a successful repatriation. Further research is needed to validate failure rates once performance and successful repatriation components are included.

Contrary to findings in other international expatriate studies, Edmond (2002) suggested that selection criteria, quality of cross-cultural training programs, quality of repatriation program, and cultural background or heritage of the manager did not appear to impact expatriate failure rates. His research also determined that the relationship between compensation and expatriate failure rate was very weak but supported, whereas the relationship between spouse's inability to adjust and expatriate failure was strongly supported. Given that Edmond's (2002) study was published two decades ago and is based on expatriate experiences from the last century, more recent research is clearly needed. Such updated studies should consider the impact of the COVID-19 pandemic and the technological advances brought by Industry 4.0 using a more holistic definition of failure.

Celaya and Swift (2006) conducted a study focusing specifically on pre-departure training of US expatriates working in Mexico, including several industries in different regions of the diverse country. Their final recommendation for effective pre-departure training was categorized into three important areas: inclusion of experienced expatriates as part of the training program, field experience pre-departure for trainees, and focus on identifying and building expatriate's cross-cultural skills during selection and training process. Littrell and Barba (2013) argued that different regional behaviors exist within Mexico that should be taken into consideration to better understand the workers' dynamics and expatriate effectiveness. Littrell and Barba (2013) referred to Contreras-Ibanez and Cedillo-Duran's (2007) distinction of eleven cultural regions in Mexico attributed to geographical, climatic, and specific customs and traditions. The article discussed expatriate experience in the 21<sup>st</sup> century by highlighting the changes that Mexican workers have experienced over the last decades, which seem to indicate a

shift from how they were perceived before. Due to its magnitude, US international business has some influence on the evolving culture of Mexico's business (Howell et al., 2007).

### **Theoretical Applications**

Several theories help explain the challenges international expatriates face in their quest to successfully complete an international assignment. Among those theories are the theory of met expectations (Caligiuri et al., 2001), attribution theory (Manusov & Spitzberg, 2008), spillover theory (Andreason, 2008) and social exchange theory (Fee & Michailova 2021; Michailova et al., 2022).

#### ***Theory of Met Expectations***

One of the top factors influencing expatriate failure rates in general, as well as specifically for US expatriates in Mexico, is the lack of adaptation (Bennett et al., 2000). The theory of met expectations aids in explaining this phenomenon. The theory of met expectations “proposes that the more congruent an individual's expectations are with the individual's reality once on the job, the greater the individual's satisfaction and adjustment” (Porter & Steers, 1973; Wanaous, 1980, 1992, as cited in Caligiuri et al., 2001, p. 359). A manager is typically presented with an overseas assignment that creates an expectation based on the information the corporation provides and the information that the manager knows, the gap will be filled with assumptions. To the extent that what is expected is as close to the experienced reality as possible, the adjustment will be easier, and the individual has a better chance of being satisfied. To the extent that the expectations are not met, the expatriate may experience dissatisfaction and will have a difficult time adapting and successfully completing the assignment (Mahajan & De Silva, 2012).

Expatriates and their families may encounter differences between expectations and reality in many circumstances in their professional as well as social adaptation process (Caligiuri et al., 2001), ranging from minor and others major situations, depending on the degree of importance given by the expatriate or his family. Minor expectation challenges may result from differences in the timing of meals, accessibility of products, social engagement norms, among others. More consequential issues may result from differences in the medical system, lack of availability of activities that were important to a family member in the home country, inability of the spouse to work, security concerns, and host country social interaction working norms or labor laws, among others (Andreason, 2008).

Caligiuri et al. (2001) connected the idea of met expectation to CCT. The authors have proposed that if the content of cross-cultural training is relevant to the upcoming experience, then such training is expected to positively impact the expatriates' met expectations and ultimately their adjustment and job performance. "If expatriates have insufficient or ambiguous information about the host country, they will use mental shortcuts, such as stereotypes, to create expectations about it" (Caligiuri et al., 2001, p. 360). Stereotypes are created by previous limited knowledge or assumptions, not necessarily by current reality, and they affect cultural and business perceptions.

Stereotypes can also cause significant challenges to the adaptation of expatriates and their families to the host country (Caligiuri et al. 2001). Generalizations cause individuals to make assumptions that may not be accurate. To illustrate this point Caligiuri et al. (2001) mentioned conclusions that may be reached because of language similarities between countries. Examples of stereotypes include British are polite individuals or Latin-Americans have poor time management.

### ***Attribution Theory***

Attribution theory “is the internal (thinking) and external (talking) process of interpreting and understanding what is behind our own and others’ behaviors” (Manusov & Spitzberg, 2008, p. 38). “The fundamental principles of attribution were established to describe how individuals draw causal links to perceived events or others’ behavior” (Seele & Eberl, 2020, p. 765). Every expatriate must process information and arrive at causal explanations. To the extent that the expatriates are equipped or trained to be able to arrive at the right causal explanations for the unfamiliar environment, they should be able to process what is happening.

Expatriate managers must learn to interpret events and behaviors in the new environment to adapt to the new culture and enhance chances of international assignment success (Ramlan et al., 2018). For example, an emotional response in one culture may be perceived by the receiver as aggressive but in another culture may be perceived as passionate and caring. Casual conversations, including family situations, may be perceived as courteous and necessary to build trust before talking business in some cultures, for an expatriate it may be seen as an invasion of privacy, too personal and unnecessary. In some cultures, punctuality may be seen as a sign of respect and conveys a sense of urgency while in other cultures it is of less importance. Talking at a higher tone may be perceived as disrespectful and, in some countries, it may be a sign of engagement and excitement (Hall, 1990; Ramlan et al., 2018).

### ***Spillover Theory***

Given that spouse and accompanying family adaptation are such important factors in expatriate assignment failures (Andreason, 2008; Cole, 2011; Edmond, 2002), it is relevant to discuss spillover theory. The basis of this theory is to explain how what happens at work can significantly influence, disturb, or enhance family life. In very simple terms, if the spouse and

accompanying family are adapting well, they can have a positive impact on the work adaptation of the expatriate. To the extent that they experience adaptation problems it may affect the expatriate manager's work performance adaptation. "Spillover theory explains work influences in family life" (Madsen & Hammond, 2005, p. 153). Professional, personal, and family domains of an expatriate manager interact with each other and can influence adaptation (Andreason, 2008). For example, a spouse that cannot continue to pursue an academic or professional career may have problems adapting to a host country, which can increase tension in the family interactions that can have a negative effect on the expatriate adaptation.

### ***Social Exchange Theory***

Another area of consideration with practical application for improving the success rate of expatriate assignments considers the relationship between the HCN and the expatriate. "Social exchange theory (Homans, 1958) seeks to explain how reciprocal exchange transactions (Molm, 1997) can sustain productive interpersonal relationships" (as cited in Michailova et al., 2022, p. 12). HCN and expatriate can support and learn from each other if both perceive value in their interactions. In the relationship between HCN and expatriate both have much to gain and much to lose. "The theory posits that individuals enter into reciprocal relationships of supporting and learning from others based on both sides receiving an outcome of value" (Fee & Michailova, 2021). For example, HCNs may benefit from practicing a new language, exposure to home country manager, and learning home country MNE ways of doing business. Simultaneously, the expatriate may learn about the differences between the two cultures which may help them to successfully execute home company strategies. In a well-designed expatriate program, both individuals can benefit from their interactions, thus benefiting the participants and the MNE.



## Propositions

As per Yin (2018) and Baxter and Jack (2008), propositions assist in framing a case study, defining boundaries, describing the data to be collected, thus forming the foundation of the conceptual framework to be used. “The theory or theoretical propositions that went into the initial design of your case study, as empirically enhanced by your case study’s finding, will have formed the groundwork for your analytical generalizations” (Yin, 2018, p. 38). Generalizations may also emanate directly from the case study research findings (Yin, 2018).

As previously discussed, expatriate assignments represent a significant investment by MNEs and have a higher than desirable failure rate. The US investment and trade with Mexico is expected to remain significant and most likely grow due to the implementation of the latest regional trade agreement and the trends from globalization to regionalization (Witt, 2019). Thus, to reduce expatriate assignment failures, it is imperative that US corporations understand the factors that influence the success of expatriate managers in Mexico including the potentially positive role that HCNs can play in the design and execution of expatriate programs. Exploring this situation from a holistic point of view that incorporates the perspective of the HCM (Figure 3) has not yet been achieved in academic research, leading to the consideration of the following propositions:

P 1: Host country managers’ *perspective* on the expatriate journey influences the success of an US expatriate assignment in Mexico.

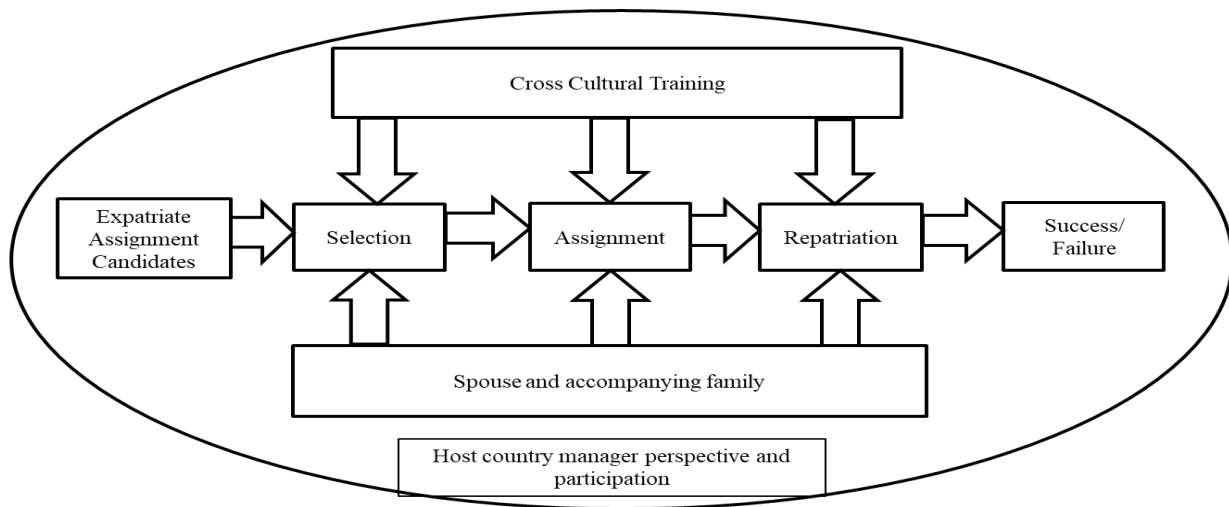
P 2: Host country managers’ *participation* in the expatriate journey influences the success of an US expatriate assignment in Mexico.

P 3: From the perspective of the host country manager, the inclusion of spouse and accompanying family in the selection, training, and repatriation stages of an expatriate assignment journey influences the success of the US expatriate assignment in Mexico.

P 4: Host country managers' training in preparation to work with an US expatriate manager influences the success of the US expatriate assignment in Mexico.

**Figure 3**

*Incorporating Host Country Manager Perspective and Participation*



### **Methodology Selected**

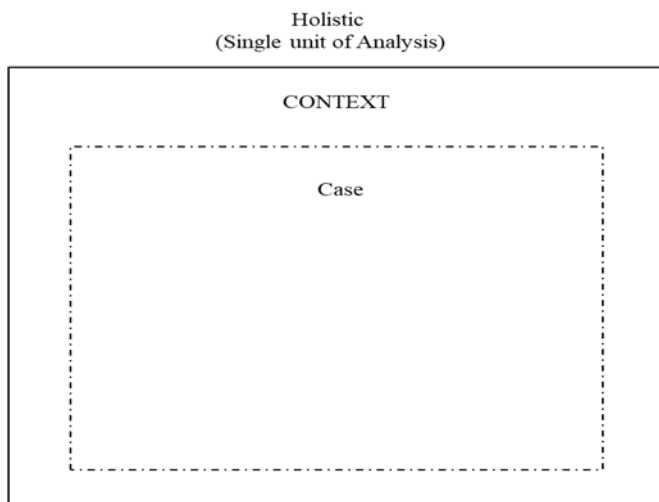
This dissertation uses a case study methodology. The case study methodology, not to be confused with the case study method of instruction, refers to a social science inquiry that follows a methodology for research as does an experiment, survey, or archival analysis (Yin, 2018). The decision to deploy a case study methodology responds to the type of research question selected, the type of behavioral control to be exercised, and the timing of the data collection (Yin, 2018). In this dissertation, the main research questions seek to address the “how” and “why” of the phenomenon under study, namely, the influences on the success of an expatriate assignment. The

study is contemporary, providing a real perspective with no behavioral controls or manipulation, and data are collected as they occur or close to the events as they develop or have developed.

As per Yin, 2018 the basic types of designs for case studies include single case design and multiple case designs. “The single-case design is an appropriate design under several circumstances, [including], having a critical, unusual, common, revelatory or longitudinal case” (Yin, 2018, p. 49). In this study, having US expatriates working in US subsidiaries in Mexico is a common case. Furthermore, Mexico is one of the most frequent US expatriate destinations mostly because of its importance for US international business trade as discussed in previous chapters. According to Yin, (2018) single case design can be holistic (Figure 4) or embedded (Figure 5). In a holistic design no logical subunits can be identified, and the study may intend to study a global or holistic situation in an organization. In this study, all units are at the manager level inside the same single case represented by the Mexican subsidiary of a US MNE. Based on this consideration a single case design type 2 is appropriate.

**Figure 4**

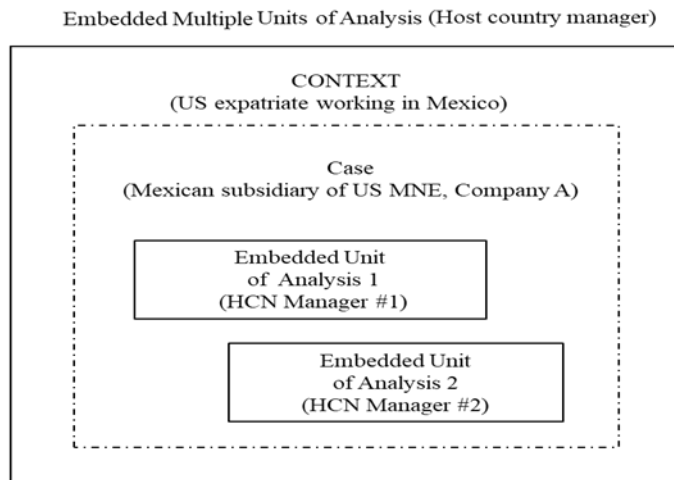
*Single Case Study - Design Type 1*



*Note:* Adapted from Yin (2018).

## Figure 5

### *Single Case Study - Design Type 2*



*Note:* Adapted from Yin (2018).

This study follows a type 2 design as illustrated in Figure 5 (Yin, 2018). It is a single-case design with two units of analysis embedded. As discussed in Chapter 1, assignments of US expatriates in Mexico rank among the highest in global business. Within Figure 5, the context represents the US expatriate in Mexico (host country) and the case is the company in which the US expatriate is assigned within Mexico. The embedded unit of analysis are two Mexican HCN managers. The motivation for the single-case study is developed more thoroughly in Chapter 3 of this dissertation. The goal of the case-study design is to investigate if and how including the perspective of the host country manager can positively influence the success of US expatriate managers in Mexico. The idea is to have a more complete understanding of the factors that influence the US expatriate journey success from the atypical research view of the host country manager.

The unit of analysis is the host country manager working with the US expatriate. The study incorporates two host country managers working in the same company. This case methodology design allows for future replication to find nuances or differences between

findings. All these characteristics are typical of a case study methodology (Yin, 2018). The research questions are more explanatory and open ended allowing a story to develop and extend thus advancing knowledge and inquiry in alignment with a case study methodology. The next chapter describes the methodology and its application to the present study in detail.

## **CHAPTER 3 — METHODOLOGY**

Selecting the correct methodology for a study is essential for the exploration of the problem to be addressed and the questions to be answered. Yin (2018) has suggested three conditions that need to be taken into consideration before deciding what study methodology to use: “(a) the form of research question posed, (b) the control a researcher has over actual behavioral events, and (c) the degree of focus on contemporary as opposed to entirely historical events” (p. 9). The following sections connect these considerations to the current study.

### **Rationale for Case Study Method Selection**

The following analysis of the current research is based on the three conditions mentioned by Yin (2018). The central question in this study is how to improve the success of US expatriates in Mexico by considering the perspective and participation of the host country manager, which is expected to provide a more complete understanding of the expatriate journey. Three of the four research questions are focused on the how and why, as is typical of case studies. This study exercised no control over actual behaviors which is one of the fundamental characteristics of case studies. Finally, the study mostly focused on the ongoing experience of the host country manager interacting with an expatriate. Taking all the above into consideration and given the aspiration of this study to develop knowledge on US expatriate success in Mexico

by including the perspective of host country managers, the case study methodology is the most appropriate.

### **Case Study Methodology**

The case study methodology is one of the most difficult research methods to execute (Yin, 2018). “A case study is an empirical method that investigates a contemporary phenomenon (the ‘case’) in depth and within its real-world context, especially when the boundaries between phenomenon and context may not be clearly evident” (Yin, 2018, p. 15). A case study is used to understand complex phenomena taking a real-world perspective currently occurring without controlling the study (Yin, 2018). In case study methodology, the how and why questions posed are geared towards explanations and descriptions. These questions incite a conversation to capture a perspective. The questions asked during the discussion are open ended to provoke thoughts and reflection as opposed to closed ended questions that may look for simplistic answers or specific data to support pre-determined hypotheses.

As opposed to other alternatives, the case study methodology allows for the flexibility and fluidity of a conversation to occur within the context of a semi-structured interview. The objective is to provide the necessary methodological rigor while balancing against a rigid or inflexible process. This flexibility allows the interviewer to investigate topics of interest and specifically explore themes within the boundaries of the study, which are set – in part - by the propositions. With this method, host country managers are not limited to fixed answers and can provide color to their perspective using their own words.

As noted in Figure 5, the context for this research is the US expatriate in Mexico (host country) and the case is the MNE Mexican subsidiary to which the US expatriate is assigned. The embedded unit of analysis are the two Mexican host country managers (HCN) interviewed

who interact with a US expatriate manager within the selected multinational enterprise (MNE). The MNE is a private company with a US expatriate program. This is a single case design (Figure 5) with multiple embedded units of analysis (2) at the same level (i.e., manager level). Yin (2018) suggests a single case design is appropriate when the focus of discovery is a critical, unusual, common, revelatory, or longitudinal situation and is justifiable as is a single experiment that may be used in experimental design. Both the context and the case of this current study exemplify a common occurrence represented by the US expatriates working in Mexico which, as discussed in Chapters 1 and 2, is a prevalent scenario in international business for MNEs.

### **Case Study Researcher**

Yin (2018) has suggested that the case study researcher should have several attributes, including “a firm grasp on the issues being studied” (p. 82). Most of my professional career has revolved around international business, which explains my interest and illuminates my qualifications to conduct this case study. The challenge of maximizing the benefits of expatriate assignments has always intrigued me. Understanding and conveying the message that cultures are not good or bad but different became a central theme in my professional journey. As an executive for one of the largest European financial institutions, this researcher witnessed the challenges that Spanish executives confronted to successfully perform in Latin American countries as well as the impact that expatriate assignment failures have on the strategic execution of an MNE. Later in my career, as the first President for the Latin American region for a US Fortune 500 company, it was my experience that opening and managing operations and/or acquiring companies abroad is a very complex endeavor, even as a manager born and raised in the region, who is fluent in Spanish and English and with functional business knowledge of Portuguese. The MNEs that the researcher has worked with utilize the deployment of home



country nationals (Spanish and US expatriates) as the main tool to venture into, expand, and prevail in different countries in Latin America. The basic assumption is that international assignment success centers around selecting the right resource and creating the best possible conditions for the expatriate as well as host country managers to perform proficiently.

In addition to this managerial experience, the researcher has been an expatriate operating in Latin America as well as a host country manager interacting with home country expatriates. Both roles are challenging and to some extent dependent of each other. Including the perspective of the host country manager in the design of an expatriate assignment was never a consideration for the Spanish financial institution or the Fortune 500 company the researcher worked with. Participating in an EDBA program has allowed the researcher to acquire the research and data collection skills to explore the topic from a complementary host country manager perspective, through an engaged scholarship lens (Van de Ven & Johnson, 2006). This combined professional experience and academic preparation has also provided the appropriate tools and preparations for the execution of this research case in the largest Latin American country partner for the US, Mexico.

### **Components of Research Design**

According to Yin (2018) the case study research design components are: 1) case study questions, 2) propositions, 3) the ‘case’, 4) logic linking the data to the propositions, and 5) interpretation of findings. The four questions driving this dissertation, as disclosed at the beginning of Chapter 2, are:

RQ 1. Why and how can Mexican host country managers contribute to the success of US expatriate managers in each stage of an expatriate journey?

RQ 2. How does a Mexican host country manager define an US expatriate manager's assignment success or failure?

RQ 3. What preparation did the managers (host and expatriate) and the expatriate family expect for themselves and how were the expectations (not) met?

RQ 4. What is the perspective of the Mexican host country manager on the inclusion of spouse and family in the selection, training, and repatriation stages of an US expatriate assignment?

The research questions are tied to propositions. Those propositions guide the research but also allow deviations to follow the information collected. The propositions link the study to specific areas of attention. Propositions are the foundation that may enable analytical generalizations (Yin, 2018). In this study, generalizations are not based on statistical analysis and no extrapolations of data take place. Generalizations are made based on argumentative claims, that cannot be merely stated at the conclusion of the study, they must be discussed (Yin, 2018). The following four propositions are both framing the semi-structured interviews and framing data analysis.

P 1: Host country managers' perspectives on the expatriate journey influences the success of an US expatriate assignment in Mexico.

P 2: Host country managers' participation in the expatriate journey influences the success of an US expatriate assignment in Mexico.

P 3: The inclusion of spouse and accompanying family in the selection, training, and repatriation stages of an expatriate assignment journey influences the success of the US expatriate assignment in Mexico.

P 4: Host country managers' training in preparation to work with an US expatriate manager influences the success of the US expatriate assignment in Mexico.

The case refers to the MNE that uses US expatriate managers to execute their strategy in Mexico. The logic that links that data to the proposition is the independent and unique perspective that host country managers have on the success of US expatriate working in Mexico. The criteria for interpreting the findings are provided by evaluating the data collected during the interviews and triangulating against the documents reviewed. Table 2 shows how the research questions relate to propositions and then to the semi-structured interview guiding questions.

### ***Quality of Case Study Design***

Some researchers assert that case study research is not as well known or revered as other more traditional empirical social science methodologies (Fletcher et al., 2018; Yin, 2018). Most of the concerns arise from incomplete understanding of the methodology and the perceptions of insufficient rigor and process. The quality of most social science empirical research design is usually evaluated based on construct validity, internal validity, external validity, and reliability (Yin 2018). For a descriptive or exploratory study, the evaluation is focused on construct validity, external validity, and reliability.

**Table 2**

*From Research Questions to Propositions to Semi-Structured Interview Questions*

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RQ 1 Why and how can Mexican host country managers contribute to the success of US expatriate managers in each stage of an expatriate journey?	P 1: Host country managers' <i>perspective</i> on the expatriate journey influences the success of an US expatriate assignment in Mexico.	IQ 1 Can you please tell me what is/was your position and main responsibilities at (_____) when you were /are working with a US expatriate?
	P 2: Host country managers' <i>participation</i> in the expatriate journey influences the success of an US expatriate assignment in Mexico.	IQ 3 What factors were/are critical for the success of a US expatriate assignment?
	P 4: Host country managers' training in preparation to work with an US expatriate manager influences the success of the US expatriate assignment in Mexico.	IQ5 In what parts of the expatriate journey did you participate (see Figure 1) and what did that participation entail?
		IQ 7 In what expatriate assignment stage, if any, do you believe the host country manager should be included to positively influence the success of the expatriate assignment?
		IQ 8 What recommendations would you suggest be implemented to maximize the success of US expatriates in Mexico?

---

**Table 2**

*From Research Questions to Propositions to Semi-Structured Interview Questions*

---

RQ 2 How does a Mexican host country manager define an US expatriate manager's assignment success or failure?	P 1: Host country managers' <i>perspective</i> on the expatriate journey influences the success of an US expatriate assignment in Mexico.	IQ 2 How do you define success in an expatriate assignment?
	P 2: Host country managers' <i>participation</i> in the expatriate journey influences the success of an US expatriate assignment in Mexico.	
	P 3: From the perspective of the host country manager, the inclusion of spouse and accompanying family in the selection, training, and repatriation stages of an expatriate assignment journey has the potential to influence the success of the US expatriate assignment in Mexico.	

---

**Table 2**

*From Research Questions to Propositions to Semi-Structured Interview Questions*

---

<p>RQ 3 What preparation did the managers (host and expatriate) and the expatriate family expect for themselves and how were the expectations (not) met?</p>	<p>P 1: Host country managers' <i>perspective</i> on the expatriate journey influences the success of an US expatriate assignment in Mexico.</p> <p>P 2: Host country managers' participation in the expatriate journey influences the success of an US expatriate assignment in Mexico.</p> <p>P 4: Host country managers' training in preparation to work with an US expatriate manager influences the success of the US expatriate assignment in Mexico.</p>	<p>IQ 4 Describe what preparation you had, if any, before, during and/or after the expatriate arrived in Mexico to support their success.</p> <p>IQ 5 In what parts of the expatriate journey did you participate (see Figure 1) and what did that participation entail?</p>
<p>RQ 4 What is the perspective of the Mexican host country manager on the inclusion of spouse and family in the selection, training, and repatriation stages of an US expatriate assignment?</p>	<p>P 1: Host country managers' <i>perspective</i> on the expatriate journey influences the success of an US expatriate assignment in Mexico.</p> <p>P 3: From the perspective of the host country manager, the inclusion of spouse and accompanying family in the selection, training, and repatriation stages of an expatriate assignment journey has the potential to influence the success of the US expatriate assignment in Mexico.</p>	<p>IQ 6 Did your firm include spouse/partner or accompanying family in the expatriate journey and at what stage?</p> <p>IQ 6 a) Do you think that including the spouse and accompanying family may influence the success of the expatriate assignment? If so, how?</p> <p>IQ 6 b) During what stage do you think the spouse and accompanying family should be included? How and why?</p>

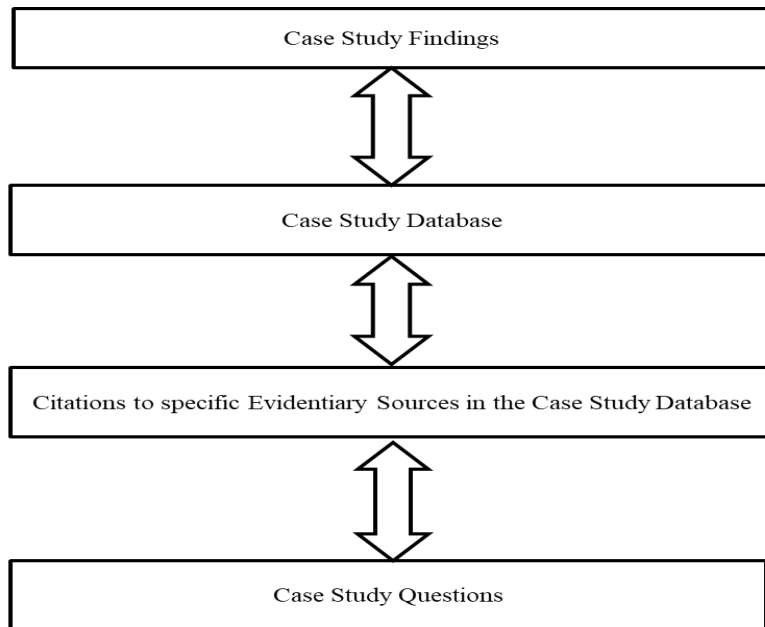
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Construct validity refers to the “extent to which a study investigates what it claims to investigate” (Gibbert et al., 2008, p. 1466). A pilot case study was performed with three managers who have expatriate experience to ascertain if the design of the study was appropriate for what it intended to study. All participants of the pilot case are Spanish native speakers and have experience working with or in Mexican operations. They validated that the proper terminology was used in the semi-structured interviews. The pilot case is discussed in more detail later in this chapter. In this dissertation, construct validity is supported by using at least two sources of evidence (semi-structured interviews and documents). The semi-structured interviews as well as corporate and public documents reviewed are used to triangulate information that can support a finding. A proper chain of evidence has been implemented to simplify following the flow of derivations from the case study research questions to the case study findings as well as from the case study findings to the case study research questions as illustrated in Figure 6.

The research questions guide the evidence collection process. The evidence collection process is documented including a description of how and when it was collected and how it was preserved and stored. The evidence is organized in a database for analysis that led to the study findings. In addition, the draft report has been reviewed by a dissertation chair, second committee chair, and a dissertation committee reader. The interviews transcripts and translations to English were reviewed and approved by the host country managers representing the units of analysis of the study. The purpose of the host country manager’s review is to corroborate the evidence collected and ensure that their perspectives were properly captured.

**Figure 6**

*Chain of Evidence*



*Note:* Adapted from Yin (2018).

External validity refers to the possibility of generalization of findings (Gibbert et al., 2008). Case studies use analytical generalizations as opposed to the typical statistical generalizations that are common in other methodologies. The research questions point to how and why, which open the door to propositions. In this case, the generalizations are analyzed under the light of established theories such as attribution theory, theory of met expectations, social exchange theory, and spillover theory (see Chapter 2), which connect research questions to propositions that lead to data collection and ultimately to findings that can be generalized. The flow from research questions to propositions to semi-structured interview questions can be seen in Table 2.

Reliability refers to the objective that the results can be replicated by another researcher studying the same case over again (Gibbert et al., 2008). The case study research has been



performed with the intent to minimize errors and biases. The two tools used to achieve this goal were the development of a case study database to facilitate replication and the development of a case study protocol to provide transparency of the process. A case study database includes “the case study notes, the case study documents, and the narratives collected during the study, organized in such a way as to facilitate retrieval for later investigators” (Yin, 1994, as cited in Gibbert et al., 2008, p. 1468). Given its importance, a separate section is dedicated to the case study protocol.

### *Sources of Evidence*

A typical case study uses a combination of sources of evidence such as documentation, archival records, interviews, direct observations, participant observations, and physical artifacts (Yin, 2018). The main source of evidence in this case study is a semi-structured interview (Exhibit A) with the host country manager who is the embedded unit of analysis (as per Figure 5), complemented by the review of documents and to some extent direct observations during the interview.

“Semi-structured interviews are generally conversational in tone and partially structured, roughly based on a set of predetermined questions to direct a fluid discussion around the central topic” (Passley, 2021, p. 2), allowing for procedural variations depending on the interaction with the interviewee (Yin, 2018). The process is similar to a guided conversation regarding the questions under consideration and the propositions established. The research questions, the propositions, and the interview guide provide the framework to keep the conversation focused on the study. The interviewer should pre-disclose any bias to the interviewee to avoid leading the information gathering exercise. In this case study, the semi-structured interview is used to guide

the discussion with the aim of inciting a conversation to capture the host country manager's perspective.

The other sources of evidence considered for this case study are company documents related to expatriate assignments and external public documents regarding expatriate assignments. Company documents, when available may include expatriate assignment policies, repatriation policies, training program for host country as well as home country managers, and any other related document on expatriate assignments discovered as part of the interview process. Publicly available information as well as company produced documents are used to describe the company, thus enriching the case study context. Secondary documents are evaluated with caution with consideration for possible source bias (Yin, 2018). Most documents are prepared for a specific audience and not for the purpose of a case study. Understanding the audience and purpose of each document is critical for interpreting inferences. Reviewed documents are used to triangulate information that can support or not a finding.

### **Case Study Protocol**

A case study protocol strengthens the case study research methodology rigor and is a highly recommended practice (Yin, 2018). The purpose of the protocol is to document how the case study is operationalized in order to keep the researcher on topic, anticipate possible study problems or challenges, and identify as well and communicate with the audience for the study. "The protocol is a major way of increasing reliability of the case study and is intended to guide [the researcher] in carrying out the data collection from a single case" (Yin, 2018, p. 96).

Following Yin (2018), the case study protocol consists of four sections: overview of the case study, data collection procedures, protocol questions, tentative outline for the case study report. The first section, overview of the case study, includes a high-level background on the

project, a summary of the purpose of the study and its audience, the research questions, propositions, and theoretical frameworks, as well as the case study substantive issues. The second section, data collection procedures, describes the data collection process, how the data is to be collected and how the researcher prepares himself for the data collection. The semi-structured interviews were performed using Teams Microsoft software application. The interviews were recorded with the interviewee's consent. The data was analyzed manually while basic Nvivo functionalities are also deployed. The data was transcribed using AI software Sonix and compared to original audio and notes taken by the researcher. The general analytical strategy relied on the theoretical propositions and working the data ground up as discussed by Yin (2018). An interview guide was used for reference purposes and as part of the case study rigor. The interviews were conducted in Spanish. The interview guide was translated by the researcher, a native speaker, and reviewed by the dissertation chair who is bilingual. As part of the pilot case process, described later in this chapter, the translations were reviewed, refined, and validated by native speaker managers with international experience following a collaborative approach (Douglas & Craig, 2007). The review by the managers with international experience had the dual objective of ensuring the researcher had the right guiding questions to address the research questions and that the guiding questions were properly translated to Spanish. All the international managers participating in the pilot case are bilingual, with experience working in Mexico. One of the international managers is a Mexican citizen working in Mexico who can help refine any language nuances in the semi-structured interview Spanish translation.

The interviews began by explaining the purpose of the questions and methodology. This introduction reminded the host country manager that the conversation is confidential and to be used for academic research. The interviewer asked for permission to video record or voice

record the conversation. A release was signed for confidentiality and privacy purposes. At the end of the conversation, the place, time, and duration of the interview was noted. Contact information was exchanged in case the host country manager remembered some other relevant information that he/she wanted to discuss or if the interviewer had some follow-up questions. Finally, the interviewer provided the host country manager with a high-level overview and expected due date for the next stages which included asking him/her to review a draft of the final interview document. The semi-structured interview guidelines and scripts are included in Appendix A (English) and in Appendix B (Spanish).

The third section of the case study protocol addresses questions to operationalize the case study. These questions are directed to the researcher to keep the focus on the purpose of the data collection process and how it is executed. Example questions include: “Have I avoided leading questions?” “Have I disclosed any potential researcher biases?” and “How can I be sure to differentiate between respondents’ opinions and experiences?” The fourth and final section of the case study protocol is the construction of a tentative outline for case study report. The purpose is to motivate the researcher to remain focused on what the case study wants to accomplish, including the original research questions.

### ***Candidate Selection***

Candidates are selected based on purposive (Berg, 2001; Christensen et al., 2014) and snowball sampling (Christensen et al., 2014) where they meet certain criteria. This study sought to identify two Mexican host country national managers working in financial services or manufacturing sector in a Mexican subsidiary of a US MNC. The candidates should have at least a decade of professional experience and have worked with a US expatriate manager journey in the last ten years. The candidates for the study were sourced using the relationship that the

Crummer Graduate School of Business at Rollins College has with IPADE in Mexico. IPADE, a leading academic institution in Mexico, maintains relationships with companies in the market that may benefit from the study. The term manager, whether applied to the HCN or the expatriate, refers to the individuals' role in the corporate management structure. Manager does not necessarily represent a hierarchical relationship between the host country manager and the US expatriate. The participants in the study have been identified by letter and numbers to assure their anonymity; for example, host country manager 1 from Company A. No financial consideration was provided for participating in the study. Results and recommendations will be shared including a discovery discussion about any other topics that the participants may be interested in exploring in the future as part of an engaged scholarship approach.

### **Pilot Case Study**

According to Yin (2018), a pilot case study is a formative process enabling the researcher to develop relevant questions given the case study objective, research questions, and propositions. When executed correctly, a pilot case study enables adjustments to protocols based on the feedback of pilot case study participants and deep reflection by the researcher, thus enhancing the quality of process and data interpretation. Considerations in designing a pilot case study include selection of pilot cases, scope of pilot inquiry, reports from pilot study.

### ***Selection of Pilot Cases***

For this dissertation, the pilot case participants were known to me and have agreed to participate based on our shared professional history and their expressed interest in the topic. The pilot case participants are managers with over 20 years of international business experience working with MNEs who have participated in international expatriate assignments. These managers have host country manager experience, have worked in Mexico or with Mexican firms;

have Spanish language proficiency, and are a mix of citizens from the US, Mexico, and other countries. All participants are volunteers; no compensation or incentive is provided other than the satisfaction of participating in the process and sharing the results.

The first manager is Mr. Orlando López, a US citizen with over 30 years of professional experience including work in international business in Europe (Amsterdam, Czech Republic, and London), Latin America (Venezuela, Mexico, Brazil, and Puerto Rico) and the US (NY and Atlanta) with multiple MNEs mostly in the financial services and business consulting industries, including American Express, Assurant, and McKinsey. Mr. López has been a home country manager as well as an expatriate manager in Mexico and Brazil, among other countries. The second manager is Mr. Gabriel Camarena who has over 20 years of experience working with MNEs like Dow Chemical, Eli Lilly, Bausch Health Companies, and Ike Asistencia. Mr. Camarena is a Mexican executive at Ike Asistencia in Mexico City with experience working with US home country expatriate managers. The third manager is Mr. Federico Bunge, International Division President for a US Fortune 500 company. Mr. Bunge has over 20 years of experience, mostly in the financial services industry. Mr. Bunge is an Argentina national with experience working as an expatriate in different countries for US MNEs such as Citibank and Assurant and has also worked as a host country manager dealing with expatriate managers.

These managers are engaged sequentially allowing my learning from their contributions to be considered for the next engagement. The diversity of thought, professional experiences, the multitude of places they have worked, their experiences working in or with Mexican companies, and their diverse nationalities will aid in refining the study and lay the foundation for the generalization of findings into markets outside Mexico.

Neither Mr. Bunge nor Mr. López, nor Mr. Camarena have a family relationship with the researcher, nor did they work in the same company at the time of this study. Mr. Bunge and Mr. López worked with the researcher at Assurant. Mr. Camarena worked at Ike Asistencia while Assurant had a minority interest that was later divested while the researcher was working at Assurant.

### ***Scope of Pilot Inquiry***

A pilot case study is defined as “a preliminary case study aimed at developing, testing, or refining the planned research questions and procedures that will later be followed in the formal case study” (Yin, 2018, p. 287). In this instance, the scope of the pilot case study included making sure the research questions were appropriate for the objectives of the study, reviewing the procedure to execute the study, reviewing the relationship and alignment between research questions, propositions and semi-structured guiding questions (Table 2), and reviewing the translation to Spanish of the semi-structured interview guiding questions. The pilot case study was expected to provide important feedback to refine the approach of the final case study, including the evidence collection process interview guide, confirmation of the Spanish translation, as well as helping to anticipate challenges. The information was considered along with the ongoing literature review to adjust the case study's operationalization.

### ***Pilot Study Report***

The report prepared after the pilot case study included recommendations and comments from the participants. The researcher documented lessons learned, and the adjustments made for the final case study design and interview procedures in the pilot case study report and review adjustments with the dissertation committee. The pilot case study report is not a formal part of the study; its main audience is the researcher. The pilot case report has been captured in an

informal memo for documentation and internal purposes not intended to be part of the case study research final report or for publication.

### **Ethical Considerations**

Given that this case study collected data from human subjects, it followed the proper procedure to address any ethical considerations. Before starting data collection, a research proposal was filed following Rollins Institutional Review Board (IRB) guidelines. The reporting of results and conclusions have been kept anonymous by identifying the company by letter and host country managers by number.

### ***Voluntary Participation***

Participation in the study is completely voluntary. Each host country manager was given the opportunity to withdraw from the study at any time.

### ***Conflict of Interest***

Precautions were taken to avoid any conflict of interest or the perception of a conflict of interest. Prior activities in Mexico or related to the company participating in the case study were disclosed to the host country managers and to the IRB as part of the application process. Any recommendations to avoid even the appearance of a conflict of interest were adopted.

Chapter 4 describes and discusses the data collection process, the analysis performed, and the findings of the case study. Chapter 5 elaborates on the conclusion of the study, the study limitations, and future research opportunities.



## **CHAPTER 4 – THE PROCESS, RESULTS, DATA ANALYSIS AND FINDINGS**

As discussed in the preceding chapters, expatriate assignments are expensive and often have a high failure rate. Academicians have studied the factors that impact the success of such assignments for several decades (Baliga & Baker, 1985; Johnson et al., 2006; Lin et al., 2012). In this study, the researcher explores the role that the host country manager (HCM) could play in influencing the success of US expatriates in Mexico using a Case Study methodology based on semi-structured interviews with Mexican host country managers from US MNEs. In this Chapter, the researcher begins with the discussion of the study's candidate sourcing process, followed by the semi-structured interview logistics, the case study research methodology application, and concludes with the coding process and its application to the expatriate journey, the theories discussed in Chapter 2, and the four propositions that are the basis of the study. Chapter 5 discusses the conclusion, limitations, and future research agenda.

On a separate note, and with the objective of increasing diversity and to include a female perspective in the pilot study, Federico Bunge was substituted by Karen Porter Wolf in the pilot study. Karen is a US citizen, English native speaker not fully bilingual, married to a Spanish native speaker, with more than 25 years of experience in a Fortune 500 company working as a US expatriate in a host country, and with international expatriates in the home country. She

worked as a US expatriate in Ireland establishing a new corporate claim processing center and later on was interim President of Assurant Mexico.

### **Candidate Sourcing Process**

The study used purposive (Berg, 2000; Christensen et al., 2014) and snowball sampling (Christensen et al., 2014) techniques to source participants. In purposive sampling the researcher searches for candidates that fit the study criteria and in snowball sampling the researcher asks study participants for referrals based on the study criteria. The candidate sourcing process proved to be more difficult than originally expected. Some candidates decided not to participate due to company's confidentiality and privacy concerns and others did not fit the study criteria elaborated in previous chapters. The following paragraphs review the process used and results of candidate sourcing.

As a first step in securing qualified participants, the researcher contacted IPADE Business School administration and faculty, some of whom have or had a relationship with Rollins College. The IPADE outreach resulted in two recommendations for Mexican executives. These executives declined or were not available to engage. The next effort was to reach out to the three Mexico Young Presidents Organization (YPO) chapters. This channel resulted in no referrals to candidates that met the study selection criteria. The researcher also reached out to the YPO Southern Seven Chapter, which includes company presidents from seven southern US states. This resulted in a few referrals for candidates with expatriation experience from non-US MNEs. Next, the researcher connected with the Presidents of Ike Asistencia, Assurant Mexico, and several executives from US MNEs with no positive results.

Extending the networking approach, the dissertation chair, Dr. Conway Dato-on, introduced the researcher to a Crummer School alumnus currently working for Siemens Energy

and formerly a Mexican employee of a US MNE in Mexico. This alumnus referred the researcher to two Mexican executives from different companies. One of the referrals currently works with an MNE in the US and previously worked for another US MNE in Mexico and the second one works for a US MNE in Mexico. The first executive declined to participate but the second one agreed to be part of the study (HCM 1). Following the same company (Company A) lead, the researcher connected with a professional colleague who was an expatriate for a US MNE in Mexico. This colleague referred the researcher to two more executives from the same firm. One of the leads (HCM 2) currently works for Company A in Mexico and the second one (HCM 3) previously worked with Company A in Mexico from 1998 to 2020 and recently joined a UK MNE. Both referrals fit the study criteria and identify with different genders, thus adding an element of diversity to responses. Additional efforts were made to reach out to IPADE Alumni with no positive results.

All candidates interviewed worked with US expatriates while working at Company A in Mexico. Company A is of particular interest given its long history in Mexico as a significant employer and its standing as an iconic company in the US. Currently, Company A has over 4,000 associates working in Mexico within three major businesses and several factories, and a professional support center, as per HCM 2. The final sample of three individuals, see Table 3, represents diversity in gender, position in the firm, and interaction with US expatriates. The three respondents include two male and one female, a professional who worked on the same team as the US expatriate, the President of the MNE in Mexico who was an expatriate in the US and championed the use of US expatriates in Mexico, and a former Director of Human Resources in Mexico who supported expatriate managers. This combination results in data from different points of view within the organization, providing a diverse perspective to assess the presence or

absence of influence that a host country manager can have in the success of an expatriate assignment. The interviews took place in April of 2023.

**Table 3**

*HCM Respondent Demographics*

<b>Manager</b>	<b>Resident Country</b>	<b>Job Category</b>	<b>Gender</b>	<b>Primary Language</b>	<b>Current Company</b>	<b>Expatriate Experience</b>	<b>Working Years</b>
HCM 1	Mexico	Engineer Team	Male	Spanish	A	No	20+
HCM 2	Mexico	Corporate Executive	Male	Spanish	A	Yes	20+
HCM 3	Mexico	HR Executive	Female	Spanish	AZN	No	20+

**Interview logistics**

Each interviewee was given the choice of conducting the interview in person in Mexico or via video conference. All participants decided to use videoconferencing technology. The researcher used Teams by Microsoft, provided by Rollins College as part of the Office 360 license. Before each interview, the participants had a general conversation with the interviewer to discuss the project, its purpose, and to answer any process questions. Most concerns raised by the participants were related to confidentiality and privacy. HCM 3, requested an email from the researcher noting the study’s purpose and scope to obtain permission from her current employer (UK MNE) to participate in the study. Permission was requested and granted with no additional conditions. In addition, the participants received a document with Figure 1 and a release form (Appendix C) that explained the details of the process, including confidentiality and privacy terms. The release form was discussed prior to the interview, then initialed, signed, and dated by

both parties after the interviews. These documents were saved in the dissertation Teams database.

The interviews were conducted in Spanish within the Teams platform and lasted 45 to 60 minutes. The researcher deployed a secondary device for a back-up recording in case Teams recording functionality did not work. Once the researcher verified the video recorded interviews, the backup recording was deleted to safeguard the confidentiality and privacy of the information. The interviews were transcribed into Spanish using the commercial artificial intelligence software Sonix. The transcripts were edited by the interviewer to ensure accuracy. The Spanish transcript was translated to English using the same artificial intelligence program. The English translations were edited by the researcher to accurately reflect the interview. The English transcript translation was shared with the interviewees for their comments and agreement that the content accurately reflected the interview. Minor grammatical changes were made that had no impact on the study. All documents were stored in the Teams database. The original Teams recording as well as the Spanish edited transcription, the English edited transcription, and the signed release forms were saved to the dissertation Teams data base. The transcription and translations hosted in Sonix included a side-by-side detail of the recording and the actual transcription for review purposes. All participants agreed to be available for further conversations if needed and were also reminded and provided with details to contact the researcher in case they wanted to make additional comments after the interview. All candidates expressed interest in reviewing the results of the study once finished and were curious about expanding the study to include other MNEs nationalities and expatriates from other countries.

## **Case Research Methodology Application**

In general, the case research methodology presents many challenges but simultaneously allows for a unique, rich research process guided by less restrictive rules than other methodologies (Creswell, 2007; Yin, 2008). Among others, those challenges include how to present the data and how to perform the analysis in a way that supports the findings and allows the research to be replicated and expanded in the future. The basis of such analysis is the data collected and how it is coded. The following paragraphs review the four general analytical strategies and the five analytical techniques recommended by Yin (2018) as applied in this study.

Yin (2018) recommends four general strategies for analyzing case research data. Each strategy can be used depending on the research and data under consideration. The four general strategies are:

- 1 Relying on theoretical propositions
- 2 Working your data from the “ground up”
- 3 Developing a case description
- 4 Examining plausible rival explanations

In this study, the researcher used the first two general strategies to analyze the data under consideration. Applying the first strategy, the researcher followed the propositions and the research questions discussed in Chapter 2, which were the basis of the study design. Applying the second strategy, the researcher reviewed the data under consideration to discover patterns and concepts relevant to the study.

Yin (2018) also recommends the use of one of five analytical techniques:

- 1 Pattern Matching
- 2 Explanation building

- 3 Time – Series Analysis
- 4 Logic Models
- 5 Cross – Case Synthesis

For this study, the researcher used the pattern matching technique to compare the data collected to the host country perspective and participation model and the propositions presented at the start of the study design. An explanation building technique was used to understand if, how, and why the data supported the model presented during the design of the study. Creswell (2007) described the analytical process in similar steps beginning by preparing and organizing the data, followed by coding, and representing the analysis in different formats.

### **Coding Process**

The first step in the coding process was for the researcher to review and familiarize himself with the data, followed by coding, and interpreting the data (Creswell, 2007). The researcher first looked at the interviews, consciously reading them several times before going into the details for coding. For this study, the researcher used two codebooks to analyze the data. Codebook 1 (Table 4) represented some of the main constructs mentioned in Chapter 1, the theories under consideration presented in Chapter 2, and other common themes across the interviews. Codebook 1 explored how the interviews did or did not reveal the application and expansion of the four theories under consideration: attribution theory, the theory of met expectations, spillover theory, and social exchange theory. In addition, this approach investigated the existence of patterns among important constructs identified in the research design. Yin (2018) has described pattern matching in the case study methodology context as “comparing an empirically based pattern –that is, one based on the findings from your study – with a predicted one” (p. 175). For example, all the HCMs interviewed agreed that incorporating

the perception of the HCMs influences the success of the US expatriate assignment in Mexico as presented in proposition 1 in Chapter 2.

This table represents the codes used for the dissertation case study analysis using the context, themes, constructs, and theories discussed in the first three chapters of the dissertation. Any mention to MNEs refers to US multinational enterprises with operations in Mexico, home country refers to the MNE home country in this case the US, host country refers to Mexico, and an expatriate refers to a US manager that works for a US MNE in Mexico on an assignment.

**Table 4**

*Codebook 1*

<b>Name</b>	<b>Description</b>
Adaptation Expatriate adaptation Family adaptation HCM Adaptation	The process to acclimate the US expatriate, HCM, and/or HCM family to the Mexican or US culture during the expatriate journey.
Assignment performance Assignment failure Assignment reviews Assignment success	The performance of US expatriate during his/her expatriate journey in Mexico.
Communication	Communication between the US expatriate, HCM, and/or the accompanying family during the Expatriate Journey in Mexico.
Concerns	Worries that US MNE, the US expatriate, HCM, and/or the US expatriate accompanying family have during the Expatriate Journey in Mexico.
Cultural sensitivity	How the differences between the host country (Mexico) and home country (US) are taken into consideration during the expatriate journey in Mexico.
Expatriate Candidates	Sourcing process by which a US MNE considers home country nationals expatriate candidates for the US expatriate journey in Mexico.



**Table 4***Codebook 1*

<b>Name</b>	<b>Description</b>
Family participation All stages Assignment Expatriate Candidates Repatriation Selection	The stages where the US expatriate family could participate in the US expatriate journey in Mexico.
Training (CCT) Expatriate Family HCM	Any intervention designed to increase the knowledge and skills of expatriates to help them operate effectively in the unfamiliar host culture (Brewster & Pickard, 1994; Harris & Brewster, 1999; Kealey & Protheroe, 1996; Shumsky, 1992).
HCM participation	The role, perspective, and/or participation that the host country (Mexico) manager has or could have in the US expatriate journey in Mexico.
Repatriation	The US expatriate process to return to the home country (US) after the expatriate assignment in Mexico.
Selection	The MNE process to select the US expatriate manager to be deployed in Mexico.
Theory Attribution theory Social exchange theory Spill over theory Theory of met expectations	Theories discussed for consideration during the dissertation proposal defense and included in Chapter 2 of the dissertation.

Codebook 2 (Table 5) corresponds to the propositions discussed in Chapter 3. These propositions are the building blocks for the expatriate journey theoretically explored in Chapter 1 (Figure 1) and discussed with the interviewees for this case study. This table represents the propositions codes used for the dissertation case study analysis using the context, constructs, and/or definitions discussed in the first three chapters of the dissertation.

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**Table 5***Codebook 2*

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<b>Name</b>	<b>Description</b>
Proposition 1	Host country manager's perspectives on the expatriate journey influences the success of an US expatriate assignment in Mexico
Proposition 2	Host country managers' participation in the expatriate journey influences the success of an US expatriate in Mexico
Proposition 3	The inclusion of spouse and accompanying family in the selection, training, and repatriation stages of an expatriate assignment journey has the potential to influence the success of the US expatriate assignment in Mexico.
Proposition 4	Host country managers' training in preparation to work with an US expatriate influences the success of the US expatriate assignment in Mexico.

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Both codebooks were used to extract relationships from the semi-structured interviews with HCM 1, 2, and 3 from Company A. To support this process, the researcher used NVivo mainly for structure, documentation, and organization purposes. Although NVivo is a powerful tool, its output cannot be considered a conclusion or final result (Yin, 2008) as in other statistical analysis tools used for quantitative research. The responsibility for drawing conclusions based on the analysis remains with the researcher. As per Yin (2018), “you are searching for patterns, insights, or concepts that seem promising” (p. 167). Together and independently, the result of both codebooks’ coding pointed to common themes that supported the research propositions on the importance of the HCMs perspective and participation to positively influence the success of an expatriate assignment.

## **Coding the International Assignment**

Six themes were discovered while analyzing the data under Codebook 1 (i.e., measures of success, expatriate assignment candidates, selection, assignment, repatriation, and family adaptation). The following sections discuss each of these themes.

### ***Main Measure of Success***

In general, the interviewees agreed that the main measure of success was to meet or exceed the business objectives of the expatriate assignment. HCM 3 described her experience by stating, “Well, success I think would have to be defined in terms of achieving the objectives for which you are doing that expatriation.” The business objectives discussed by interviewees included opening an office, department, or a business, developing a team, the transfer of knowledge between the home country and the host country during the assignment as well as the successful repatriation. The primary consideration regarding those objectives was that they need to be clearly stated, clearly understood by all parties, and that they can be objectively measured. The expatriate and accompanying family adaptation was characterized as something that facilitates the success of the assignment and that now more than ever plays a significant role inside the current MNE culture. HCM 3 stated, “We are not only an entity capable of working and generating results but there has to be a good balance of our well-being.”

### ***Expatriate Assignment Candidates and Selection Stages of Expatriate Journey***

The interviewees agreed that the HCM perspective and participation in the expatriate journey (Figure 1) influences the success of the expatriate assignment. Although all of them mentioned that the HCM should participate in all stages, their contributions during the initial stage of expatriate assignment candidates were seen as less impactful. The selection stage was seen as an important stage for the HCM to participate, as described by HCM 2:

I do believe that it is important for the manager to participate in this selection, to evaluate if this personality is going to be a good fit within the host country organization, if it is going to be a fit with the culture.

### ***Assignment Stage of Expatriate Journey***

The HCMs participation during the assignment was perceived by the interviewees as critical for the success of the assignment and as an integral part of the assignment objectives. The development of a healthy and productive working relationship and environment with the HCM team, transferring knowledge, and adaptation to the work environment cannot happen without the active participation of the HCM. For example, HCM 2 stated:

I think it is very important. And I say this because the success of a leader also depends a lot on the functioning of his team and how it works. And to the extent that the expatriate has developed people and brought out the best potential and the best in them, of course, it is going to have a very significant impact on the success of overall or of that designation.

### ***Repatriation stage of Expatriate Journey***

The participation of the HCM in the repatriation stage is seen as a component of the evaluation of the expatriate assignment, the development of the US expatriate as a candidate for other opportunities, and the transfer of responsibility to the HCM. HCM 1, 2, and 3 referred to the importance of the HCM participation in the repatriation stage. HCM 1 explained that the HCMs are in a unique position to provide feedback on the US expatriate performance and adaptation given their daily interactions:

...because in the end, who were you living with, working [with] on a day-to-day basis? It was with the local team. So, giving that perspective is also important. This worked, this did not work, you have these skills, and we saw these gaps.

HCM 2 made the point that both HCMs and home country managers should participate in the repatriation stage, “And in the repatriation, I think there should always be a manager in the home country and the host country involved in the process.” Furthermore, HCM 3 referred to an existing tool that enables HCMs participation in the evaluation of the US expatriate manager, which is part of the repatriation stage and the overall performance review of the US expatriate. In her words:

Well, the work team could also evaluate him, because then you also have another very common tool in these companies, which include these organizational climate metrics and that's where the employees evaluate the managers. So, again with this tool that already exists throughout the company, you can have an evaluation of each manager, of each leader, how he was evaluated by his team, and it would be through that tool that you could have that metric or that type of evaluation.

### ***Family Adaptation during the Expatriate Journey***

All three interviewees agreed that from the HCM's perspective the participation of accompanying family in the expatriate journey positively influences the success of the expatriate assignment, which aligns with the literature review discussed in Chapter 2. The researcher examined the role that adaptation has in the expatriate journey. Adaptation to the host country is one of the key factors that facilitates the success of an expatriate assignment as evidenced by the following two HCM 2 comments: “The cultural adaptation is not only for him but also for his children.” “I think it is very important because if the significant other and the children adapted

or adapt easily, then the expat will be able to come to the office to give 100%.” Adaptation as a factor for a successful expatriate assignment includes the accompanying family. At the same time, the interviewees’ experience working with US expatriates showed how the participation of their family in several stages of the expatriate journey created a positive influence on the assignment’s success. For example, HCMs argued that initiatives allowing the expatriate and/or his family to adapt result in a family environment that allows the US expatriate to concentrate on work, without having to worry about the family adaptation. This is consistent with the literature review discussed in Chapter 2.

The HCM participation in the adaptation process has two separate initiatives according to the interviewees. The first process refers to the HCM participation in activities to support their adaptation to working with a US expatriate. HCM 1 participated in some cultural sensitivity courses and HCM 2 and 3 highlighted that this would be a gap that the US MNE should take into consideration in designing expatriate assignments. The sentiment was described by HCM 2 stating:

I think that is [referring to the HCM participating in trainings to adapt to the US expatriate] an area of opportunity that I see in the processes that I have experience, where I believe that the host [HCM] has to have a certain preparation to understand, to put himself in the shoes of the person who comes to a different culture...

The second process refers to the HCM support to the US expatriate and their accompanying family adaptation. All interviewees agreed that the HCM provides an important support function to accelerate or ease the US expatriate family adaptation. In some instances, the support comes

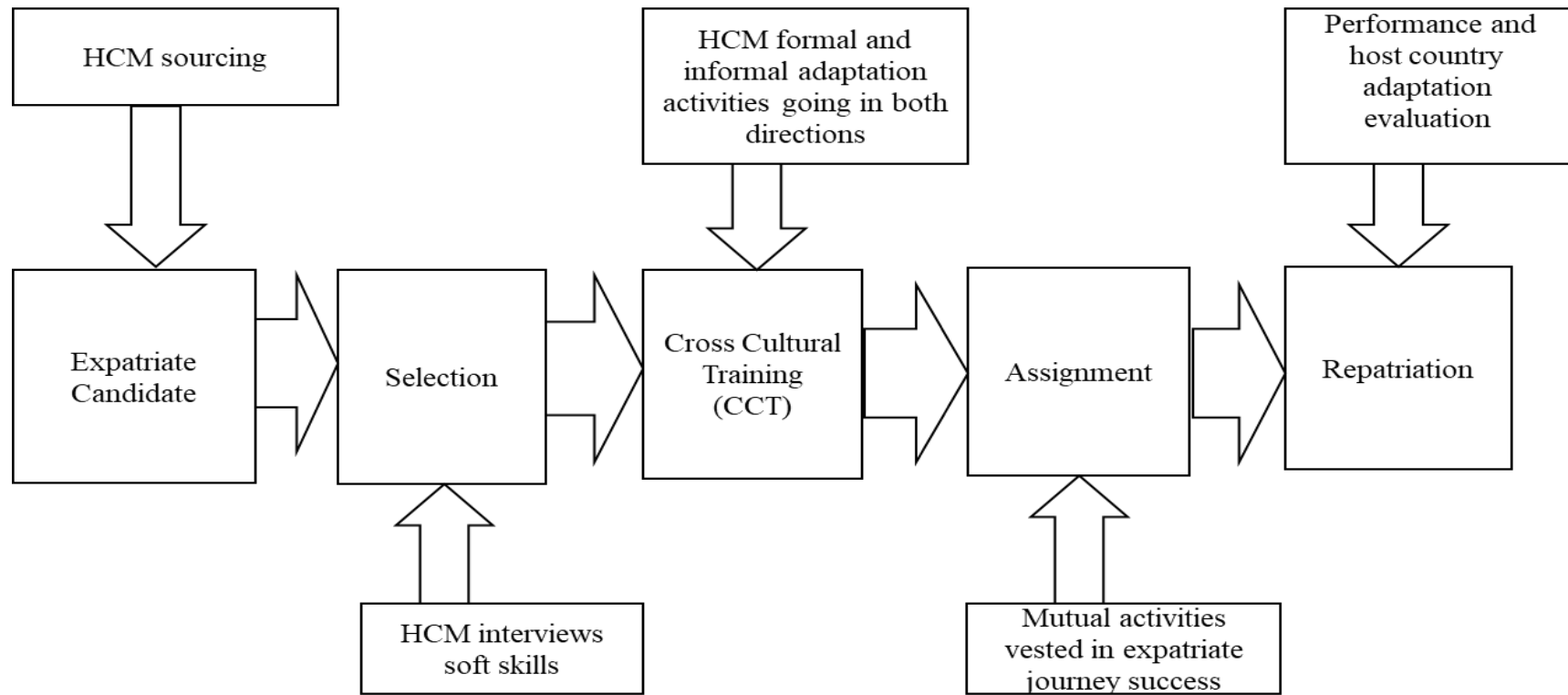
from a corporate planned process and in others from an informal process done outside the corporate expatriate assignment but seemed equally impactful. HCM 1 stated,

I think that it is the key for the team in which the person is going to be working and with whom the person is going to be collaborating, [that] they have to be involved in the assignment and also help it to be successful, not only from the point of view of the job, but from the point of view of how we can help the person to acclimate to the culture. How can we help you adapt to living in Mexico? I think it is more effective when people, when the same people who are in the country tell you, help you, accompany you, take you. It's different than if you see it in an online course.

Each of the themes discussed above provide examples of the contributions that HCMs make to influence the success of US expatriate assignments in Mexico (see Figure 7) and support the consideration of a holistic approach that includes the perspective and participation of HCMs. The following sections analyze the coding done for theoretical applications and propositions.

**Figure 7**

*Examples of HCM Contributions to the Expatriate Journey*





## **Coding Theoretical Applications**

Within Codebook 1, the researcher coded the three interviews as they related to the four theories discussed in Chapter 2 (Spillover Theory, Social Exchange Theory, Theory of Met Expectations, and Attribution theory). The researcher found support to extend all theories to new contexts as they apply to the expatriate journey and the influence that the HCM can have in the success of the US expatriate assignment in Mexico. Throughout the conversations, the interviewees highlighted the importance of clarity and understanding of the meaning of behaviors between cultures and how that understanding is key to the success of an US expatriate assignment and the transfer of knowledge between the home country and the host country and vice versa. The bi-lateral communication and understanding, according to interviewees, is critical to expatriate assignment success. In other words, it is not only important that the US expatriate understands the meaning of words and behaviors of the HCM but also that the HCM understands the words and the behaviors that the US expatriate uses to communicate and interact.

### ***Spillover Theory***

“Spillover theory explains work influences in family life” (Madsen & Hammond, 2005, p. 153) and vice versa. The comments from all interviewees demonstrated a strong connection to this theory, especially as related to expectations from workers in younger generations. The following quote encapsulates this idea; HCM 3 stated that now, more than ever, companies stress the importance of life balance as part of their values, “Sometimes you see very successful executives who have managed to deliver, ... that even went beyond expectations from the company’s business point of view. But sometimes it could have come at a very high cost, personal or otherwise.”

The concept of life balance includes the well-being of the family for which the adaptation to the host country becomes extremely relevant as per HCM 3 comment.

Well-being is physical, health, mental, economic, spiritual, it is, in short, it has, it has many facets in which it should be measured, and I believe that there is much more conscience today. There is awareness that workers should have a good balance and in a much more integral way and therefore it should become an important factor for someone to be able to give good results.

HCM 2 described the lack of family adaptation as a pressure that affects the US expatriate, “Definitely because if the family does not adapt, then I think you are going to have an expatriate with a pressure, a situation with the family.” HCM 3 discussed how sometimes the MNE takes extraordinary measures to support the spouse’s job-hunting activity and even hires the spouse in order to maintain the US expatriate’s home well-being in balance, so that the US expatriate to be in the best position to execute their duties according to the expatriate assignment:

For example, if the spouse has a career that could also be impactful to the family, if there was a disruption, they were supported to help the spouse find a job. Well, first you help them to have the necessary permits to be able to work in the country. And sometimes I say, in companies as big as [Company A], yes, sometimes even help them to find a position within there, but in another business component where there was no conflict of interest. I did get to see that kind of support when you had these dual career families.

At the same time, HCM 2 referred to the role that the host country manager plays in helping the US expatriate to adapt. The HCM participation in the US expatriate and accompanying family adaptation takes place as part of the formal expatriate program and informally, as mentioned by

HCM 1 and HCM 2. The literature reviewed in Chapter 2 supported the importance of family adaptation for the success of an expatriate assignment and the research interviews support the influence that HCM participation in the adaptation process can have in the success of the US expatriate assignment in alignment with the model presented in Figure 3.

### ***Social Exchange Theory***

Social exchange theory refers to the positive effect in productivity that a mutually beneficial relationship can have (Michailova et al., 2022). This theory also received support by the three interviewees' comments. HCM 2 mentioned that the expatriate assignment is not only about achieving a business goal but is also about learning from the individual, which is much easier when both parties understand that there is benefit for both in the success of the US expatriate assignment. HCM 1 expanded on the importance of communication and the need for the HCM to have a role in the assignment where they see the benefit for themselves and for the organization:

It is also for the work team in Mexico, [interviewee referring to the HCMs that worked with the US expatriate] the people with whom this person works, the expatriate, also feel a benefit. Feel like how nice that this person came to this project! [positive feeling that the interviewee hopes the HCMs to have about the US expatriate assignment] Because it is important that the team [members] feels that [the mutual project] is moving forward in the right direction.

HCM 3 concentrated her comments on this topic, emphasizing the importance of team functioning as a reflection of the US expatriate leader's assignment success:

And I say this because the success of a leader also depends a lot on the functioning of his team and how it works. And to the extent that the expatriate has

developed people and brought out the best potential and the best in them, of course, it is going to have a very significant impact on the success of overall or of that designation.

In summary, when the HCM perceives and understands the benefit he gets from the assignment in addition to the benefit that the US expatriate receives from the assignment, they create a reciprocal relationship of support and learning as explained by Social Exchange Theory. Once the HCM understands their role in the assignment and is conscious of the professional benefit of participating, he is committed to the project's success. His commitment, perspective, and participation with the project influence the success of such assignments and support the model presented in Figure 3.

### ***Theory of Met Expectations***

The theory of met expectations refers to the positive influence in adjustment and satisfaction that occurs when a person's expectations are met by reality (Caligiuri et al., 2001). This theory took significant relevance in all interviews when comments were made regarding the importance of having clear, measurable objectives as well as the importance of knowing what to expect from the assignment in the professional, social, and personal aspects. For example, HCM 3 suggested that, "expectations can always play a very key role in whether things go right or go wrong." Having clear expectations prior to the start of the process and having those align with the reality in Mexico during the expatriate assignment as closely as possible has a positive impact on the US expatriate as well as the HCM. The influence of the US expatriate and the accompanying family understanding the assignment and what to expect was discussed earlier in the literature review in Chapter 2. However, the importance of the host country managers having

their expectations met is not part of the traditional Expatriate Journey (Figure 1). Rather, the interview data supports the extended model presented in Figure 3.

### ***Attribution Theory***

Attribution theory, which refers to the interpretation and understanding of others' behaviors (Manusov & Spitzberg, 2008), can be applied to the influence that a HCM may have in the success of an US expatriate assignment. HCM 3 reflected on how behaviors and communications style differences between the two cultures (i.e., Mexican and US) may result in roadblocks to assignment success.

Sometimes the American tends to be very direct, not to say, very assertive. And maybe the Mexican, especially the Mexican from the central part of the country, Mexico City, is perhaps too polite and guarded, as well as perhaps follows very conservative traditions of what is considered to be polite. These comments emphasize why it is essential to the success of an overseas assignment that the US expatriate understands the Mexican culture, including and how a behavior can be perceived. It is just as critical that the HCM understands the US culture and the expatriate's social and professional behavioral style to reduce the possibility of misunderstandings that can negatively impact the objectives of the US expatriate assignment. This cross-cultural communication is based on a lot more than understanding the language; it is about understanding the behavior, working style, communication style, and social style as described by HCM 3:

...it [the way the US manager speaks] does not mean that he does not appreciate you or that he is being rude or that he does not value the work that you do  
[interviewee making reference to the impact of an HCM not understanding the US expatriate behavior]

The application of attribution theory in the context of the HCM influence on the success of an US expatriate assignment supports the model presented in Figure 3.

### **Coding Propositions**

As part of the researcher's analysis, the three interviews were coded directly to the propositions:

P 1: Host country managers' *perspective* on the expatriate journey influences the success of an US expatriate assignment in Mexico.

P 2: Host country managers' *participation* in the expatriate journey influences the success of an US expatriate assignment in Mexico.

P 3: From the perspective of the host country manager, the inclusion of spouse and accompanying family in the selection, training, and repatriation stages of an expatriate assignment journey influences the success of the US expatriate assignment in Mexico.

P 4: Host country managers' training in preparation to work with an US expatriate manager influences the success of the US expatriate assignment in Mexico.

Proposition 1 was supported by the interviewees in several aspects such as getting the HCM's perspective on the qualifications of the US expatriate candidate's soft skills and their applicability to be able to operate successfully in Mexico as suggested by HCM 3:

Well, well, I mean, I think it could also give interesting insights to have the input of someone local [HCMs] and who also understands the idiosyncrasies of the place where the person is going to arrive. I think maybe this local leader can say hey, you know I see certain characteristics in this person that are not going to help him or her get [be successful] here, .... I see this kind of flexibility, openness,

etcetera that is going to help you a lot when you come to an assignment here in Mexico.

Proposition 1 was also supported by interviewee comments about incorporating the HCM perspective on the US expatriate performance. As per HCM 1, a measure of success also takes into consideration the impact that the US expatriate has on the teams that they work with, including their expatriate assignment learnings and ensuring the host country is properly set up to continue doing the work that the US expatriate was doing.

Proposition 2 is the logical progression after receiving the HCM perspective and refers to the influence of their participation in the Expatriate Journey. All interviewees strongly supported the premise that HCM participation has influence on the success of the expatriate assignment, as noted in the following quote by HCM 2: “I believe that [HCM participation positively effects expatriate assignment outcomes] during the whole process [of the expatriate journey].” The HCM participation in all Expatriate Journey stages was seen as positive and with a good degree of influence. The only exception was in the expatriate assignment candidates' stage where the influence was seen as less impactful. HCM 1 characterized the contribution as being limited by their knowledge of managers in the MNE home office. HCM 2 noted that in their experience the host country had little to say about the sourcing process:

Probably when looking for expatriate candidates, the [host country] manager would have little to say [in reference to adding more candidates to the pool under consideration because they are limited to the managers they know- in Mexico].

Rather, I would hope that the people in the US organization can identify potential candidates. Once the US MNE identifies candidates it is important to involve the HCM.

The home country managers should have a better understanding and knowledge of the complete pool of candidates available. However, once the list of candidates is narrowed down to a few, the HCM should be actively engaged in the evaluation of the candidates as to their fit to the host country operations, the team that they will be working with, and the objectives of the assignment.

In the following stage of the expatriate journey, cross-cultural-training (CCT), the interviewees discussed the dual participation of the HCM in the adaptation process for the expatriate and the accompanying family as well as HCM participation in preparation for working with the US expatriate. The fourth stage of the expatriate journey corresponds to the assignment itself where the active participation of the HCM in terms of teamwork to achieve the objective of the assignment as well as the knowledge transfer was deemed critical by the interviewees. The last stage of the assignment is the repatriation process where, as mentioned earlier, the interviewees see a role for the HCM to evaluate the business performance of the expatriate as well as the adaptation skills of that manager in order for the MNE to take it into consideration for future opportunities.

Proposition 3 regarding the participation of the family in the Expatriate Journey had significant support from two of the interviewees and weaker support from HCM 3 but with the recognition that their participation during the expatriate journey is more relevant with younger generations. HCM 2 expressed regarding the family adaptation process:

Definitely starting with the social adaptation and acceptance, from making them feel welcomed. But it is not a work welcome, but a welcome to your social group. Include them and show them where they can do activities, depending on their concerns, questions, or interests that they may have. You make recommendations, you accompany his wife to the market.



HCM 1 went further and categorically stated, “I think they do have to be involved at all stages.” Based on the literature reviewed in Chapter 2 and the interviews performed in this study, Proposition 3 is fully supported and could become even more influential in the success of expatriate assignments in younger generations.

Proposition 4 was also supported during the research in terms of CCT to understand the behavior of the US expatriate as per the following statement by HCM 3:

Prior to the expatriate's arrival and during the first months. It is important that the acclimatization is intentional, that there is a whole process behind it, that it is not taken for granted, that taking online courses is good enough or having two or three interviews is good enough and that being in the place is going to acclimatize in some way. I think it needs to be work with the organization and the team that the expatriate is going to be working with.

The Expatriate Journey planning should include the preparation and adaptation support for the US expatriate as well as the team of HCMs involved in the assignment.

### **Secondary Data**

In Chapter 2, the researcher mentioned the use of other sources of evidence to corroborate the primary data collected and to complement the study's main source of evidence (i.e., semi-structured interviews). The other sources discussed consisted of publicly available documents regarding expatriate assignments in Company A. While conducting the study the researcher faced a significant roadblock obtaining participants for the study, as noted earlier in the chapter. The study participants required that the company name remain confidential as a condition of participating in the study. Keeping Company A name confidential made it challenging for them to provide or for the researcher to use company specific information as

secondary data. However, the researcher made a general literature review of expatriate programs where Company A participated or was mentioned to ascertain the general comments included as part of this study. The secondary documents reviewed were evaluated with caution taking into consideration their provenance, primary audience, and research purpose to guard against unwanted bias.

Company A has been recognized in academic articles and business publications such as Harvard Business Review (e.g., Black & Gregersen, 1999) as having one of the most developed and effective expatriate programs in the US. As of the day of this study the firm continues to use expatriate assignments to advance their business objectives and as a talent development tool. As per HCM 2, Company A maintains a significant presence in Mexico with oversight over other countries. Given the recognition Company A has received in academic and practitioner publications for its expatriate programs, the suggestions from this study for continued improvement through the inclusion of HCM in the expatriate journey serve as an example for firms that are both successful and struggling to manage the challenges of expatriate programs. This insight is discussed further in the next chapter.

Chapter 5 includes the conclusions of the study, limitations, and agenda for future research. The conclusion incorporates a review of possible theoretical extensions, connections to the propositions presented in Chapter 2, and an evaluation of the host country managers' perspective and participation model as presented in Figure 3. The limitations section contains specific characteristics of the study to be taken into consideration when generalizing its results or the conclusions applicable in different contexts. The last section discusses the agenda for future research consideration to expand knowledge in this area to support an engaged scholarship mentality.

## **CHAPTER – 5 CONCLUSIONS, LIMITATIONS, AND FUTURE RESEARCH**

### **Conclusion**

As previously discussed, the purpose of this study was to explore the role that the HCM could play to influence the success of a US MNE expatriate assignment in Mexico. To achieve this purpose the researcher used a case study methodology with a single case design type 2 (Figure 5) with three embedded units of analysis represented by HCMs (Mexican nationals) that have worked with US expatriates from a US MNE throughout their expatriate journey. A single case design can be used for a common case (Yin, 2018) like a US expatriate from a US MNE deployed on an expatriate assignment in Mexico as discussed in Chapter 1. Originally the study was designed to have two embedded units of analysis but was expanded by including an additional unit of analysis that provided a more holistic perspective by including a female manager. The managers interviewed included a senior executive in charge of the operations in Mexico, a manager in a technical division, and a human resource executive.

Considering the literature review in Chapter 2, the interviews performed, and the application of the four theories to the data analyzed in Chapter 4, one can conclude that the suggested propositions as well as the proposed model represented by Figure 3 are supported with the caveat that the HCMs contribution in the candidate sourcing stage (expatriate assignment candidates) is limited to their knowledge of managers in the MNE home country. The host

country manager's perceptions and participation in the expatriate journey, as presented in Propositions 1 and 2, influence the success of the overall assignment. This conclusion is also supported by the social exchange theory, the theory of met expectations, and attribution theory. The inclusion of the spouse and accompanying family in the selection, training, and repatriation, as offered in Proposition 3, is relevant for the adaptation process of the US expatriate and it is supported by the literature review in Chapter 2 as well as with the application of the spillover theory, attribution theory, and the theory of met expectations. The process of adaptation and preparation (Proposition 4) should also include the HCM and is supported by social exchange theory, theory of met expectations, and attribution theory. To the extent that the HCM feels included, actively participates, prepares for the assignment, and perceives the benefits for him/herself and the organization, he/she will have a direct influence on the success of the expatriate assignment.

This research contributes to the expansion of the four theories discussed as applied to expatriate assignments. It also contributes to the expatriate assignment literature by including the factors that influence the success of US expatriate assignments in Mexico and underscores the significant role that HCM can play in such success. MNEs should consider the expatriate assignment design from a holistic point of view including the perspective and participation of HCMs in all the expatriate journey stages to influence the success of the expatriate assignment. Finally, given the high cost of expatriate assignments as well as their high failure rates, the investment of including the HCMs in the process could prove to be a win-win for the MNE, the US expatriate, and the HCMs.

## **Limitations**

As in all research, this case study has limitations that must be highlighted to extend the findings and methodology used for future research. Two particular areas of methodological limitations center on sampling. While the use of Yin's (2008) single case study design type 2 (Figure 5) approach is valid, the use of only one firm from which to draw conclusions comes with constraints. In this study, the focal firm (Company A) did not sanction identification or release of corporate data. In future studies the researcher could obtain the firm's approval to interview employees or former employees about their experience with US expatriates and receive consent to use private information as secondary sources. The second concern with sampling centers on the purposive selection of respondents. Yin's (2008) single case study design type 2 adopted here emphasizes the characteristics of respondents and does not suggest a comparison among firms. Thus, while respondents were finally identified based on purposive (Berg, 2001; Christensen et al., 2014) and snowball sampling (Christensen et al., 2014) following the criteria established in the design of the study, there is no variability in the firm-level analysis.

To expand the generalizability of the present research, future case studies could include companies' managers in different firms and industries, thus adapting Yin's (2008) multiple case design. In selecting multiple cases, future research could select firms with both positive and negative experience regarding expatriate success and failure, allowing for comparison at the firm-level of analysis. Similarly, the findings from this single case design could be reviewed by a panel of experts using a Delphi technique (Hsu & Sanford, 2007) to attain convergence of opinion on the real-world issue of expatriate assignment success.

As with all qualitative case-study reports, the data interpretation is subject to bias from the researcher (Yin, 2018). For the present study, and as per the quality of the study section

discussed in Chapter 3, the researcher's potential biases were minimized by the development of a case protocol to increase transparency, the creation of case study database in Teams hosted by Rollins College, the implementation of a pilot case to refine the study, and by disclosing the researcher's background and experiences to the interviewees and the dissertation chair, including his professional experience working with expatriate assignments in the US, Latin America (including Mexico), and European MNEs.

### **Suggestions for Future Research**

This study makes practical engaged scholarship contributions to the way expatriate journeys can be designed and how to influence the success of expatriate assignments, which are considered expensive and with high failure rates (Black et al., 1999; Chan et al., 2021; Lin et al., 2012; Wang et al., 2002). Performing studies that contribute to solving real and concrete practitioner's challenges bring the academic and business worlds closer and help propel academic inquiries to a higher level. The process also motivates practitioners to use academic research as a valuable tool to improve business processes.

In addition to the modifications to the study discussed in the limitations section, it would be helpful from the practitioner's point of view to carry out a study that includes a longitudinal perspective of how the participation of the host country managers in expatriate assignments changes over time and may continue to change as a function of different generations. Furthermore, understanding if the cultural distance between the host country manager and the home country expatriate changes the degree of impact that a host country manager can have to influence the success of expatriate assignments can be used by practitioners to adjust expatriate assignment program designs. Finally, a future study could explore what would be the additional

cost of including the HCM throughout the expatriate journey versus the impact on the expatriate assignment performance and failure rates.

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## Appendix A

### **Script for Host Country Manager Semi-Structured Interview**

These interviews strive to gather information on how to positively influence the US expatriate success in Mexico given their importance for international business, and MNEs strategies execution.

#### **Introduction**

This interview guide will be used to interview host country managers with experience working with US expatriate managers.

#### **Research Topic**

The research questions intend to study how host country managers influence the success of US expatriates in Mexico in each stage of the expatriate journey. Specifically, the study attempts to address the existing research gap of incorporating the perspective and participation of the host country manager in the design and execution of the expatriate assignment, including their views on spouse, and accompanying family participation in the expatriate journey.

#### **Approach & Methodology**

The script below will be used as a guide to allow the interviewees to express their feelings, opinions, and analysis regarding the research question and the constructs under consideration. Primary and secondary questions will be used as examples, but the interviewer may follow up with other open-ended questions to further understand the subjects' thoughts. For the successful completion of the data collection phase confidentiality and transparency must be established with the objective of making the interviewees feel comfortable sharing their insights. At the end of the conversation, the script will provide information on how the interviewee may

contact the interviewer for follow-up and establish that they may want to return with clarifying questions later. The script concludes with a recap of the purpose of the research, the interview, and what can be expected as next steps.

### **Interview Guide Overview**

The interview guide includes qualitative questions as well as follow-up questions with the objective of inviting the host country manager to share insights in a conversational manner. The interview is composed of eight questions with opportunities for the host country manager to expand in on their responses. We have included an introduction with essential information to be addressed before starting the formal interview, a conclusion to properly wrap up the process, and a final note section to properly document the process.

### **Interview Guide Introduction**

Hello! How are you? My name is Ivan C. Lopez and I appreciate you taking the time to talk to me today. The purpose of our conversation is to help me with academic research intended to improve the success of US expatriate managers in Mexico by incorporating the perspective of the host country manager throughout the expatriate journey and to complete my dissertation requirement for Crummer EDBA program. Your answers will be combined with responses by other managers in similar positions and will be kept confidential. It would be helpful if you allowed me to video record or voice record the interview for further analysis. If you prefer that I do not, I will take notes. Of most importance is that you are comfortable providing your insights on the subject under study. I would like you to read the release form that includes confidentiality and privacy protections. Let me know if you have any questions. If I have answered all your concerns to your satisfaction, I would appreciate it if you could please sign and date both copies and keep one for your records; or I can send it to you by email if you prefer. Please make sure to



initial the appropriate box if you allow me to video record, voice record or, if you prefer, only take notes. Make sure you include your name, phone number, and email at the bottom of the form.

I hope you can help me with this research by answering all my questions, but feel free to decline to answer any specific question. The interview may be terminated at any moment that you request, and we can take a break as you need. I expect the entire process to take less than an hour. At the end of the interview, I will give you my contact information in case you want to add any other thoughts or have further questions. I would also like to obtain your permission to contact you again with any clarifying questions upon review of our interview.

Do you have any concerns, questions, or points of clarification that you want me to address before we begin?

1. Can you please tell me what is/was your position and main responsibilities at (\_\_\_\_\_) when you were/are working with a US expatriate?
2. How do you define success in an expatriate assignment?
3. What factors were/are critical for the success of a US expatriate assignment?
4. Describe what preparation you had, if any, before, during, and/or after the expatriate arrived in Mexico to support their success.
5. In what parts of the expatriate journey did you participate (see Figure 1) and what did that participation entail?
6. Did your firm include spouse/partner or accompanying family in the expatriate journey and at what stage?
- 6 a) Do you think that including the spouse and accompanying family may influence the success of the expatriate assignment? If so, how?

- 6 b) During what stage do you think the spouse and accompanying family should be included? How and why?
7. In what expatriate assignment stage, if any, do you believe the host country manager should be included to positively influence the success of the expatriate assignment?
8. What recommendations would you suggest being implemented to maximize the success of US expatriates in Mexico?

### **Interview Guide Conclusion**

Thank you very much for your help today. Your insights will help to inform the expatriate process for companies seeking to utilize expatriates in Mexico. If you want to add any other comments you can certainly reach me at 305 903 8658 or feel free to send me an email to [ilopez@rollins.edu](mailto:ilopez@rollins.edu). I am available to answer any questions regarding this study and you can also contact my dissertation chair Dr. Mary Conway Dato-on at [mconwaydatoon@rollins.edu](mailto:mconwaydatoon@rollins.edu) or Dr. John Houston, IRB Rollins College at [jhouston@rollins.edu](mailto:jhouston@rollins.edu). I want to reiterate that this process is confidential, that your answers will be analyzed with those of other managers in similar positions, and it will be used to inform knowledge. We are expecting to complete the interview process of the study by 2Q2023, the analytical part by 4Q23.

Have a great day!

Interviewer

Interviewee

Company

Date and time

Agree to video recording

Agree to audio recording

Place of the interview

Duration of interview

Phone number

Email address

## Appendix B

### **Guía de Entrevista Introducción**

Hola, ¿cómo se encuentra? Mi nombre es Iván C. López Morales y agradezco que se haya tomado el tiempo para conversar conmigo hoy. El propósito de nuestra conversación es obtener su ayuda con una investigación académica que procura ayudar a aumentar el éxito de los gerentes expatriados en México, incorporando la perspectiva y participación del gerente local a través del proceso de expatriación. Sus respuestas se combinarán con las de otros gerentes en cargos similares y se mantendrá la confidencialidad de todos los entrevistados. Sería de gran ayuda si me permitiese grabar la entrevista en video o audio para propósito de documentación y futura referencia. Si prefiere lo contrario, no hay problema alguno, puedo tomar notas. Lo más importante es que se sienta cómodo ofreciendo su punto de vista. Me gustaría que leyese la página de relevo / autorización que incluye información sobre confidencialidad y privacidad. Déjeme saber si tiene alguna pregunta.

Si he contestado todas sus preguntas de forma satisfactoria, agradecería que firme y feche ambas copias y mantenga una para sus archivos. Puedo enviarle una copia a través de correo electrónico si prefiere. Por favor asegúrese de poner sus iniciales en el cuadro apropiado si está de acuerdo con grabar la entrevista en video o audio, o si prefiere que sólo tome notas. Por favor incluya su nombre, número de teléfono y dirección de correo electrónico al final del formulario.

Espero que pueda ayudarme con esta investigación al contestar todas las preguntas, pero siéntase en la libertad de declinar contestar cualquier pregunta. La entrevista puede concluir en el momento que usted decida o podemos pausar y tomar un receso si así lo prefiere. Anticipo que la entrevista se complete en aproximadamente una hora. Al final de la misma, compartiré mi información de contacto por si quiere agregar alguna información o por si tiene preguntas

adicionales. También me gustaría obtener su permiso para contactarle nuevamente si necesitara alguna clarificación sobre sus respuestas durante el proceso analítico. ¿Tiene alguna pregunta, comentario o preocupación que quiera compartir antes de comenzar?

1. ¿Puede decirme cuál es / era su cargo y responsabilidades principales en \_\_\_\_\_  
(empresa y cargo) mientras trabajaba con un expatriado de EU?
2. ¿Cómo define usted una designación de expatriado exitosa?
3. ¿Qué factores fueron / son críticos para el éxito de una designación de expatriado?
4. ¿Describa que tipo de preparación tuvo antes, durante y/o después de que el expatriado llegara a Méjico para contribuir al éxito de la designación?
5. ¿En qué etapas del proceso de expatriación usted participa / participó (Figura 1) y qué conlleva / conllevó esa participación?
6. ¿Incluyó su compañía al cónyuge / pareja o familia acompañante del expatriado en la designación de expatriado? ¿En qué etapa si alguna los incluyó?
6. a) ¿Piensa usted que incluir a la pareja y familia acompañante en el proceso puede influenciar al éxito de la asignación de expatriado? ¿Si es así, cómo?
6. b) ¿Durante que etapa de la designación cree usted que se debe incluir la pareja y familia acompañante? ¿Cómo se debe incluir y por qué?
7. ¿En qué etapa de la designación de expatriado, si alguna, cree usted que el gerente local debe incluirse para contribuir positivamente al éxito de la misma?
8. ¿Qué recomendaciones usted sugiere deben ser implantadas para maximizar el éxito de los expatriados de EU en Méjico?

## Conclusión de Guía de Entrevista

¡Muchas gracias por su ayuda en el día de hoy! Sus ideas van a contribuir positivamente a mi investigación. Si quisiera añadir algún otro comentario puede comunicarse conmigo al +1 305 903-8658 o enviarme un correo electrónico a [ilopez@rollins.edu](mailto:ilopez@rollins.edu). Quiero reiterarle que este proceso es confidencial, que sus respuestas se tomarán en consideración con aquéllas de otros gerentes en cargos similares a la suya y que los resultados de la investigación se utilizarán para propósitos académicos. Espero completar el proceso de entrevistas del estudio en \_\_\_\_\_, la parte de análisis para junio 2023 y completar el estudio para agosto 2023. Que tenga un buen día y nuevamente muchas gracias.

Entrevistador                      Iván C. López Morales

Entrevistado                      \_\_\_\_\_

Empresa                              \_\_\_\_\_

Fecha de la entrevista              \_\_\_\_\_

Autorizo video grabación              \_\_\_\_\_

Autorizo audio grabación              \_\_\_\_\_

Duración aproximada                  \_\_\_\_\_

Numero de celular                      \_\_\_\_\_

Correo electrónico                      \_\_\_\_\_

## Appendix C

### **Interview Guide Introduction**

**Interview** Hello! How are you? My name is Iván C. López Morales, and I appreciate you taking the time to talk to me today. The purpose of our conversation is to request you help with academic research as part of Rollins College EDBA program intended to improve the success of US expatriate managers in Mexico by incorporating the perspective of the host country manager throughout the expatriate journey. Your answers will be combined with responses by other managers in similar positions and will be kept confidential. It would be helpful if you allowed me to video record or voice record the interview for documentation purposes as well as for further analysis. Of most importance is that you are comfortable providing your insights on the subject under study. I would like you to read this form that includes confidentiality and privacy protections. Let me know if you have any questions.

If I have answered all concerns to your satisfaction, I would appreciate it if you could please sign and date both copies and keep one for your record or I can send it to you by email if you prefer. Please make sure to initial the appropriate box if you allow me to video record and/or voice record the conversation. Make sure to include your name, phone number, and email at the bottom of the form.

I hope you can help me with this research by answering all the questions but feel free to decline to answer any specific question. The interview may be terminated at any moment that you request, and we can take a break as you need. I expect the entire process to take approximately an hour. At the end of the interview, I will give you my contact information in case you want to add any other thoughts or have further questions. I would also like to obtain

your permission to contact you again with any clarifying questions upon review of our conversation.

Are there any concerns, questions, or points of clarification that you want me to address before we begin?

### **Interview Guide Conclusion**

Thank you very much for your help today. Your insights will positively help the research. If you want to add any other comments you can certainly reach me at 305 903 8658 or by e mail to [ilopez@rollins.edu](mailto:ilopez@rollins.edu). I want to reiterate that this process is confidential, that your answers will be considered with those of other managers in similar positions, and that the research will be used for academic purposes. Any reference to the company or host country managers' names in a report will be done only by letter and number to safeguard the confidentiality of the participants (Company A, HCM 1, 2 or 3). We are expecting to complete the interview process in May 2023, the analytical part by June 2023 and hopefully its final compilation by August 2023. Have a great day and once again thank you!

Interviewer Iván C. López Morales

Signature

Interviewee

Signature

Company

Date

Agree to video recording

Agree to audio recording

Duration of interview



Phone number

E mail address