STAYING LOCAL: A MULTIPLE CASE STUDY OF EMPLOYEES MOVING FROM EXPATRIATES TO LOCAL CONTRACTS AT MULTINATIONAL ORGANIZATIONS IN SWEDEN AND THE UNITED STATES

A Dissertation

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ABSTRACT

Localization of expatriate employees is a new trend of employment increasingly adopted by global corporations during the past decade. In recent years, different types of international contracts have been introduced, in substitution of traditional long-term expatriate contracts, including the transfer of expatriate employees to local contracts at host organizations. In spite of its growing popularity, there is a significant lack of research on the impact of this change of contracts to expatriate employees and their families.

The purpose of this study is to explore the emerging international HR trend – localization of expatriates, with special focus on investigating the experiences of expatriates in becoming local employees at multinational organizations located in Sweden and the United States. A qualitative multiple case study approach is adopted to capture the nuanced multiple realities as experienced by expatriates during the process of localization. Eight individual case studies, four in Sweden and four in the United States, are part of this study. Themes that emerged described the experience of localization as an unanticipated career transition, significantly different from any other career transition experienced by employees, characterized by much uncertainty, isolation, and lack of a common repertoire of knowledge. This study concluded that localization is often an ill-planned, haphazard event that leaves employees without much support from their employers, mentors, and local colleagues. Implications for practice and research are presented in this study.

DEDICATION

This dissertation is dedicated to my parents Milton Bandeira Nery (*in memorian*) and Maria do Socorro Gomes. Their unconditional love, trust, and belief in me provided me the courage and confidence to explore my passions and to seek new paths. My parents supported me through my several geographical relocations, and have learned to master every new emerging technology –i.e. from fax and email to Skype and WhatsApp- in order to continue to be an everyday reassuring presence in my life. Their support made it possible for my family and I to live a balanced immigrant and expatriate life for the past 22 years of my life. More than anyone else, my mother has been aware of the challenges of recent years and will be very proud to see me finish this dissertation.

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CHAPTER I

INTRODUCTION

This study explored the emergent international Human Resources trend of localization of expatriate employees in multinational organizations in Sweden and the United States. This chapter presents an overview of the regular use of expatriates and of recent changes in global corporations in regards to the types of contractual employment utilized for international employees. It introduces the dearth of research on the topic in regards to the impact of localization in the lives of employees, particularly relating to career transition, social identity, and status passage. This chapter presents the background for the study; the purpose statement; research questions; theoretical framework; summary of methodology; significance of the study; researcher's positionality, assumptions, and biases; and operational definition utilized.

BACKGROUND

Expatriates are among the most expensive employees in a global organization, often following only CEOs (Scullion & Brewster, 2001). The salary of an expatriate employee is typically three to four times the salary of a headquarters employee in an equivalent position (Shaffer, Harrison, & Gilley, 1999). Nevertheless, global corporations have long accepted the high cost of maintaining their expatriates as a necessary expense to carry out their international business operations. Expatriates often fill an important role in global organizations in transferring skills, providing control and

coordination, and ensuring that the values and culture of the organization are adopted by their subsidiaries (Edstrom & Galbraith, 1977; Harzing, 2001).

In recent years, however, global companies have been consistently moving away from traditional expatriate contracts and are trying to implement more cost-effective international types of employment (Collings, Scullion, & Morley, 2007). Expatriate perks and benefits have been reduced consistently since the 1990s, and more intensively since the economic downturn of recent years (Crane, 2001; Economist Intelligence Unit, 2010; Smedley, 2012). Long-term traditional expatriate contracts, typically of five-year duration, with extensive benefits to the employee and his/her family (such as housing allowance, tax equalization, school tuition for the children, and travel trips home) are now less common (Crane, 2001; Economist Intelligence Unit, 2010; Smedley, 2012). As an alternative to traditional long-term expatriate contracts, global corporations are actively seeking more cost-effective approaches, such as offering short-term international assignments or local plus contracts, using local employees, hiring third-country employees, and using frequent business travelers (Collings et al., 2007; Mayerhofer, Hartmann, Michelitsch-Riedl, & Kollinger, 2004; Meyskens, Von Glinow, Werther, William, & Clarke, 2009; Stanley, 2009; Starr & Currie, 2009). Among these efforts, an increasing popular practice is the localization of expatriate employees or the transfer of the headquarters/global employee to the local subsidiary (Bosson, 2010; Hauser, 2003; Joinson, 2002; Tati, De Cieri, & McNulty, 2014).

THE EMERGING TREND OF LOCALIZATION OF EXPATRIATES

The localizing of expatriate employees is a growing trend that companies are beginning to implement in response to the economic downturn of recent years. By definition, the localization of expatriate employees is an attempt by corporations to move employees from expatriate contracts to permanent contracts with local subsidiaries, following their salary structure, labor laws, benefits, and pension plans. Consequently, these employees no longer maintain any ties to the headquarters or their home-country organization (Bosson, 2010; Hauser, 2003; Joinson, 2002; Tati et al., 2014). By this process, over a period of time, all perks associated with typical expatriate contracts will be discontinued (Bosson, 2010; Hauser, 2003).

In recent years, international companies have steadily adopted the practice of localization of expatriates. A 2002 global mobility survey reported that traditional long-term expatriate assignments accounted for 44% of cross-border transfers, while localized transfers accounted for 11% (Cendant Mobility Services, 2003). Only five years later, another survey reported that localization efforts in global companies had reached 48% and were projected to reach 57% in the following two years (ORC Worldwide, 2007). A more recent survey (Brookfield Global Relocation Services, 2012) indicated that localization is expected to be the leading policy considered for development and implementation by global companies in upcoming years. According to this survey, 36% of companies are exploring localizations options, in contrast to the adoption of traditional long-term expatriate contracts (28%) or short-term assignments (33%), and the other myriad of alternatives assignments.

The above trend is likely to continue. The cost of maintaining an extensive and expensive cadre of long-term expatriates is often an obvious one to curb when companies decide to streamline their overall operating costs. In general, the primary objective of localization is cost saving (Hauser, 2003). A 2010 survey reported that, among companies that implemented localization policies, 42% indicated that the primary reason to adopt localization practices was to control the mobility costs of their international cadre of employees (Cartus, 2010).

In addition to the goal of reducing costs, localization efforts are implemented for other reasons. In some cases, the nature of the job in question has changed from a temporary position to a long-term arrangement with the local organization. Consequently, the existence of an employee on an expatriate package is not justified, and the employee is then permanently transferred to the local organization (Bosson, 2010; Hauser, 2003; Tati et al., 2014). In other cases, expatriates seek the localization process for personal or professional reasons. On the personal side, expatriates may establish emotional ties with the host location (e.g., through marriage with local partners, continuity of children at schools). On the professional side, the host location may present better employment and career opportunities for expatriates, making it more interesting for the employee to transfer indefinitely to the location overseas (Bosson, 2010).

Localization efforts are also implemented when companies aim to create a more egalitarian relationship among employees. For instance, in cases where the expatriate job duties are similar to those of local employees, companies may try to localize expatriates for the purpose of creating an environment of equity among employees, as well as in

compliance with the business practices of the host location (Bosson, 2010; Hauser, 2003; Joinson, 2002).

A recent survey (Brookfield Global Relocation Services, 2012) of multinational companies employing localization practices identified the following five primary reasons for localization: (1) assignee initiated (meaning the expatriate desires to stay in the host country) (25%); (2) companies always localize after a certain number of years (24%); (3) cost-saving (13%); (4) lack of position at the home organization (10%); and (5) other factors (28%). This survey gives a good indication of the motives behind localization practices, as well as giving evidence of how little is still unknown about this trend. The majority of respondents (28%) identified alternative reasons for localization that are yet to be perceived and understood by relocation survey agencies.

The process of deciding on how, when, and who to localize is yet to be formalized. By and large, a majority of companies do not have formal localization policies in place. A 2007 survey indicated that only 44% of global companies had a formal policy to handle localization, and about one third of surveyed organizations addressed the issue on a case-by-case basis (GMAC, 2008). Localization policies, whenever they exist, are often tailored to different locations or different circumstances in order to allow some degree of flexibility and negotiation with employees on a case-by-case approach.

Although the localization of expatriates has become increasingly popular in recent years, this practice is not always a suitable option for all international locations. In many cases, subsidiaries are located in unsafe areas or in places where life conditions in

general are not comparable to the original location of the expatriate. In these cases, expatriates are likely to refuse their permanent localization overseas (Bosson, 2010; Hauser, 2003; Joinson, 2002). Also, visa and work permit issues might hamper localization attempts. A recent survey (Cartus, 2013) indicated that the top destinations where localization is most often utilized and needed are the United States (predominantly), China, and Switzerland.

STATEMENT OF PROBLEM

Localization of expatriates is a fairly new practice in international human resource management. Companies may have done it sporadically over the years but only recently have adopted it as a cost-saving strategy for reducing their operational budgets (Bosson, 2010; Hauser, 2003; Tati et al., 2014). As a result, not much information is available on this topic. In a preliminary literature review, I identified mostly anecdotal evidence, "how to" books, and descriptive survey data on the topic of localization of expatriate employees. At this point, limited empirical evidence was identified. As the localization trend is likely to continue in the future (Bosson, 2010; Hauser, 2003), it is important that empirical research be done.

The existing literature on this topic addresses mostly issues regarding practical matters resulting from localization, that is, issues pertaining to continuity of pensions, health benefits, and salary structure (Bosson, 2010; Hauser, 2003; Joinson, 2002), or issues associated with the adoption and implementation of localization practices by global corporations (Bosson, 2010). As of yet, there is no empirical evidence regarding the outcome of localization practices on issues of a more complex nature that are likely

to affect employees in the process of moving from expatriate contracts to localized status in the organization. Issues such as sense of professional identity, career change and transition, performance, commitment to the organization, and loyalty, among others, need to be examined to provide a deep understanding of the phenomenon of localizing expatriate employees. As of recently one study of international employees working under local contracts in Singapore identified that they receive less compensation and less preparation as compared to other employees working under expatriate contracts (Tati et al., 2014).

During the last two years, I have had a first-hand opportunity to observe employees moving from expatriate to local contracts. Because of my life circumstances of living in a mid-sized expatriate community in southern Sweden, I became aware of the turmoil that transferring from expatriate to local contracts creates in the lives of expatriate employees. In spite of the potential cost saving benefits resulting from localization, the transfer of expatriate employees to local contracts is, at times, not an easy shift. Based on my observations, the novelty of this practice may create unnecessary stress, feelings of resentment towards the corporation, and potential turnover of employees. Companies therefore must implement this practice in a well-planned and organized manner to ensure that it does not negatively affect the employee's performance and commitment to the organization.

Although there is a dearth of literature on the consequences of localization policies in the lives of expatriate employees, it is possible to tap into the existing repertoire of knowledge available on the related topic of repatriation of expatriates, in

order to understand the possible consequences of the termination of expatriate contracts and the transfer of employees to local contracts in multinational organizations.

Localization may be, in some aspects, similar to the regular ending of an international assignment when the employee repatriates to his/her home country and home organization. Employees who repatriate to their home (repatriates) or who localize in the foreign location (localized expatriates) share in common the termination of their tenure as employees with superior financial status in the organization, including access to generous expatriate packages covering the cost of housing, school for the children, home leave trips, general expenses, and so on. In addition, they both have enjoyed easier access to the global network of the firm and more visibility in the global leadership track. In most cases, both repatriation and localization of expatriates represent a significant transition for expatriate employees, involving aspects of financial loss, potential status loss, and reorganization of the network of colleagues in the organization.

Localization may also have career consequences for localized expatriates. In my conversation with an employee on the verge of becoming a localized expatriate, he presented his imminent localization as a *"*sudden death" to his global career and feared that his visibility and career prospective within the firm could be severely hampered by becoming a localized expatriate. In addition, the moment of localizing in a foreign country may become a time of personal and professional identity change for expatriates, as well as for their families. On the personal side, this is a moment of staying local, thus shifting from being expatriates to becoming immigrants. It is a moment of redefining a lifestyle, somewhat abandoning a view of the place of residency as only temporary to

establishing long-term roots in the new location. On the professional side, it is a moment of adherence to local rules and regulations in regards to employment contracts, as well as in the eyes of other expatriates and local colleagues.

Given the lack of information regarding the experiences of employees moving from expatriate to local contracts, my aim in this dissertation is to explore the practice of localization of expatriate employees from the perspective of the employees localized after working a period of time in expatriate contractual employment. As of yet, no empirical study has been identified that has addressed the impact of localization in the lives of expatriate employees. This study aims to shed light on the topic of localization from the perspective of expatriates localized to the overseas subsidiaries or headquarters of their organization. The selected participants were employed in different organizations of different industries and share in common the termination of their expatriate contractual employment and transfer to a local contract with their organization.

PURPOSE STATEMENT AND RESEARCH QUESTIONS

The purpose of this study is to explore an emerging international HR trend – the localization of expatriate employees. Specifically, this study explored the experiences of expatriates in becoming local employees in multinational organizations located in Sweden and the United States. A qualitative case study approach was adopted in this study to capture the nuanced multiple realities as experienced by expatriates during the process of localization. Two research questions guided this study:

1) What are the experiences and issues of expatriates in becoming localized employees in a multinational organization regarding career transitions?

2) What are the experiences and issues of expatriates in becoming localized employees in a multinational organization with respect to social identity?

SIGNIFICANCE OF THE STUDY

This study partially fills the void of empirical research on the emerging trend of localization of expatriate employees. At this point, mostly anecdotal evidence and survey data have been identified on the topic. The existing literature focuses primarily on general issues associated with the transfer of employees from expatriate to local contracts. No information is yet available in regard to the experience of employees when moving from expatriate to local contracts. The findings of this study may thus expand our current knowledge on this topic. As the localization trend is poised to continue in the next years (Bosson, 2010; Hauser, 2003; Joinson, 2002), findings of this study may assist organizations in implementing policies and practices that are likely to ensure the continued commitment and performance of employees when shifting from expatriate to local contracts in multinational organizations. In addition, findings of this study may help organizational leaders and human resource developers better prepare employees for this important career transition in their lives.

This study aimed to contribute to IHRD. Localization may affect career transition, career development, professional identity, performance, and organization development, issues that are important concerns of HRD. Localization of expatriates is likely to affect the development of both organizations and their employees. Having some insight into how expatriate employees experience and navigate the process of localization is possibly instrumental in ensuring that both organizations and their

members continue to produce optimum performance during and after localization. This study may also be instrumental in informing about the experiences and viewpoints of employees going through this important career transition in their professional lives, thus providing valuable information to companies that aim at implementing new policies and practices in a conscientious and respectful manner so as to preserve the well-being of employees.

THEORETICAL FRAMEWORK

I utilized Schlossberg's (1981) transition model and Tajfel's (1978) and Tajfel and Turner's (1979) social identity theory. The choice of these frameworks resulted both from preliminary observations of the phenomenon and the analysis of the findings in this study. At an earlier moment, during the phase of proposal defense, I had anticipated using another set of transition theories, i.e., Nicholson's (1987) transition cycle, to analyze one of the research questions. Ultimately, however, Schlossberg's transition model proved to be more effective in analyzing the findings of this study.

Schlossberg's model provides a framework to understand adults in transition. This model is frequently presented as a theory in the literature, and it is often categorized as an adult development theory (Evans, Forney, & Guido-DiBrito, 1998). As a definition, Schlossberg (1981) posited that a transition is set to occur "if an event or nonevent results in a change in assumptions about oneself and the world and thus requires corresponding change in one's behavior and relationships" (p. 5). According to Schlossberg, each transition varies based on its type, context, and impact (Schlossberg, Waters, & Goodman, 1995). The model suggests three types of transition: anticipated,

unanticipated, and nonevent. Anticipated transitions are often expected events in a person's life, such as graduation from high school, marriage, and beginning a career; because of its predictable nature, individuals are able to prepare for this transition in advance. Unanticipated transitions are unscheduled events that often disrupt a person's life, such as sudden death, job loss, getting a divorce, or any traumatic incident; these events often involve elements of crises that do not allow individuals to prepare for them. Nonevents transitions are events that individuals expected to happen but did not occur, such as job promotion, not getting married, and not giving birth to a child. Nonevent transitions, in particular, may significantly alter the way individuals see themselves, and the way they respond to the lack of that particular transition (Goodman, Schlossberg, & Anderson, 2006). To understand the meaning of a transition in a person's life requires considering the type, the context (the individual's personal views, work setting, personal relationships, etc.), and the impact of the transition (the degree to which it alters someone daily life and routine; Goodman et al., 2006).

The central component in Schlossberg's (1981) transition model is the assumption that a transition exists only if the individual defines it as such. In addition, the model suggests that the manner in which a person deals with the transition significantly determines the meaning of the transition to the individual. Schlossberg posited that every transition has both positive and negative elements and is dependent on the balance between resources and deficits that individuals may access to deal with them. Schlossberg suggests four major factors that influence how individuals cope with the transition: situation, self, support, and strategies –the 4 S system (Goodman et al.,

2006; Schlossberg, 1981, 2011). Situation refers to particular characteristics of the transition as it is impacted by eight situational factors (trigger, timing, control, role change, duration, previous experience, concurrent stress, and assessment). Self refers to personal and social characteristics of individuals (personal and demographic characteristics; psychological resources; optimism and self-efficacy; values; spirituality; and resilience). Support refers to assistance one may access to handle the transition (institution, family, friends, community resources). Strategies refer to the coping strategies individuals use to deal and cope with stress, while alleviating it (Goodman et al., 2006; Schlossberg, 2011).

Schlossberg's model is ideal to understand the transfer of employees from expatriates to local contractors because it considers all aspects–personal, context of the transition, and past career transition experiences. The model also allows for an in-depth understanding of the experiences of employees in becoming localized expatriates, given the particular characteristics of each transition.

In addition to Schlossberg's transition model, I utilized social identity theory, particularly Tajfel's (1978) and Tajfel and Turner's (1979) social identity theory. These authors posited that human interaction is strongly influenced by people relating to one another as representatives of a particular social group. Categorization in the group results from individuals perceiving real or supposed similarities with one another, thus creating categories of in-group and out-group membership (Tajfel, 1978; Tajfel & Tuner, 1979). Categorization may also result from the close proximity of individuals with similar stories, or who share a common fate (Campbell, 1958). Categorization may yet result

from knowing of others belonging to the same social group, which may lead to a shared common identity and the adoption of attitudes and behaviors (Brewer & Gardner, 1996; Locksey, Ortiz, & Hepburn, 1980). Categorization significantly influences the way people see themselves, thus largely impacting their level of self-concept. Tajfel (1978) and Tajfel and Tuner (1979) posited that a person's self-concept is largely influenced by their social identity, or by their membership and belonging to particular social categories.

The adoption of social identity theory in this inquiry helped me understand how expatriates see and perceive themselves while employed under an expatriate contractual assignment, and how the shift to a local contract altered their social identity and self-concept. Further, it helped me understand the change of perceived social status when shifting to a local contract.

In summary, the theoretical framework here presented was selected based on both the preliminary observation of the phenomenon of localization and the analysis of findings carried on by the researcher.

In a case study, a theoretical framework serves the purpose of both providing guidance to the research and anchoring a study in a scholarly tradition of inquiry (Miles & Huberman, 1994). In addition, Miles and Huberman noted that a theoretical framework also assists in "1. identifying who and who will not be included in the study; 2. describing what relationships might be present based on logic, theory, and/or experience; 3. providing the researcher with the opportunity to gather general constructs into intellectual 'bins'" (as cited in Baxter & Jack, 2008, p. 553). Furthermore, a

theoretical framework serves to provide a focus and definition to the researcher's choice of a research problem, and to guide the process of data collection and analysis (Hartley, 1994; Merriam, 1988). The adoption of a theoretical framework in case study design prevents researchers from collecting unfocused data and from providing description without meaning (Hartley, 1994).

SUMMARY OF METHODOLOGY

This study adopted an interpretative case study design, more specifically, a multiple case study design. The multiple case study approach was ideal to provide a holistic understanding of the experience of localization as it generated rich narrative of experiences and a more robust understanding of the phenomenon (Merriam, 1998, 2002) mediated and impacted by the context in which each participant story of localization took place.

The use of this qualitative methodology grounded in social constructivism allowed for the participants to reflect and make sense of the experiences of moving from expatriate to local contract in their organizations. It also allowed for the participants to explore their feelings in regards to how they viewed their careers and social identities. This approach produced rich and descriptive data (Merriam, 1998, 2002; Patton, 1990) that provided a thorough and holistic understanding of experiences with the emerging phenomenon of localization.

BOUNDARIES OF THE STUDY

This study adopted a qualitative approach of inquiry. It does not allow for generalization of the findings to a larger population (Merriam, 2002; Patton, 1990). In

addition, the participants in this study were selected according to predetermined criteria rather than randomly (Merriam, 2002). Under the methodology selected for this study, these are strengths rather than limitations. Consistent with the standards for a naturalist methodology, this study was bounded to specific criteria. First, it focused on only two countries (Sweden and the United States) because of convenience of location to where the researcher resides and therefore has easier access to participants. Second, this study had the purpose of exploring the experiences of employees moving from expatriate to local contract in multinational organizations. All participants in Sweden were employed at one multinational organization. The U.S. participants were employed at three organizations; their narratives of localization are thus influenced by characteristics of their companies. I tapped into my network of contacts in Human Resources to find potential participants for this study. The participants in Sweden are of various nationalities; the participants in the United States are of Brazilian nationality, which is my native nationality.

OPERATIONAL DEFINITIONS

I provide below a list of definitions of key terms for clarification and better understanding of this study. Typically, global organizations have their own particular manner of organizing and naming different types of international contracts. I provide below the way I utilized these terms.

Expatriates refers to any individual living and working outside his/her country of birth (Expatriate, 2014). The term is more often applied to individuals with professional or skilled qualifications. The use of the term often implies superior socio-economic

characteristics of such individuals as opposed to unskilled workers who are largely referred to as immigrants or migrant workers (Castree, Kitchin, & Rogers, 2013). I used the term *expatriate* to refer to any individual working on a contract of employment that provides assistance when living overseas, such as housing, school for the children, and home leave trips.

International transferee is a type of international contract utilized by one of the companies in this study that provides reduced benefits as compared to their full-fledged more generous expatriate contracts. I treated all employees with these contracts as regular expatriate employees and, therefore, used the term *expatriate* to refer to them.

Localization of expatriates refers to the transferring of employees from an expatriate to a local contract in multinational organizations.

Localized expatriates are, thus, individuals who were initially sent abroad to work at a subsidiary office or plant of their companies on an expatriate contract (often lasting from one to five years) but who were ultimately transferred to a local contract with the local organization (Yates, 2009).

Expatriate localization is a process not to be confounded with the localizing of expatriates. The former refers to the process of making expatriates become local employees (or transferring expatriates to local contracts), while the latter refers to the hiring of local employees in substitution of expatriate foreign employees (Selmer, 2004).

SUMMARY

In this chapter, I introduced the topic of inquiry–the localization of expatriate employees in Sweden and the United States. Although global corporations increasingly

employ the practice of localization, there is still a dearth of research on the topic, particularly referring to the impact of localization in the lives of employees. Based on preliminary observations, localization may potentially become a time of much stress, uncertainty, and turnover of expatriate employees. The purpose of this inquiry was thus to explore the emerging international HR trend of localization of expatriate employees, with a particular focus on career transition and social identity. A qualitative case study approach was adopted in this inquiry with the objective of capturing the multiple realities and experiences of employees moving from expatriates to local contracts.

In addition, I introduced the theoretical frameworks that guided the study, according to the emergent nature of the research design -Schlossberg's transition model (1981) and Tajfel's (1978) and Tajfel and Turner's (1979) social identity theory. I also introduced a summary of my methodological underpinnings, and addressed the significance and boundary of the study. Finally, I addressed the operational definitions used.

CHAPTER II

LITERATURE REVIEW

Chapter Two presents the literature review that informed this study. Given the dearth of research on the topic of localization of expatriates, this literature review made use of both peer and non-peered reviewed literature so far available, as well as it utilized available knowledge on related topics (i.e. expatriation and repatriation of expatriate employees).

LITERATURE REVIEW METHODOLOGY

I conducted a thorough literature review on the topic of localization of expatriates, making use of various databases –i.e. EconLit, Wilson Business Abstracts, Academic Search Complete, Business Source Complete, ERIC, Human Resources Abstracts, Vocational and Career Collection, Google Scholar, and Google. The keywords used in the search included localization, localization of expatriates, transfer to local contracts, localized expatriates. No data range was set in this search with the purpose of retrieving all relevant literature on the topic. I included in the search both peer-reviewed/referred journals, books, and non-peer reviewed material. The initial search yielded only few materials directly related to the topic, including one peer-reviewed article, three non-peer reviewed articles, and one book. In an attempt to identify more information, I decided to include in the search related topics to localization –i.e. expatriation and repatriation, particularly when addressing issues that were deemed similar to those faced by localized expatriates, such as career change and transition,

termination of international assignment, turnover. This search yielded various materials, which were quickly scanned by reading the abstract in order to identify possible similarities to issues faced by localized expatriates.

The literature review is organized in the following manner. I first briefly introduce aspects of career transition and change, social identity, and status change as influenced by the choice of theoretical framework on this study. In sequence, I present the knowledge so far available on various aspects of localization, including new trend of international employment, and types of transition packages. I then introduce the literature review on aspects of expatriation and repatriation that may relate to localization. I present those discriminating according to the three research questions in this study.

CAREER CHANGE AND TRANSITION: THEORETICAL UNDERPINNINGS

The long-standing definition of career means a person's sequence of work experience over time (Arthur, Hall, & Lawrence, 1989). The definition of career change encompasses any substantial change in work role or work context experienced by employees, such as a change of job, change of profession, or change of any orientation at work with the employee remaining both with the same job and organization (Ashforth, 2001; Hall, D. E., 1976; Louis, 1980). The definition of career transition includes a period of time in which individuals are changing their roles, orientation, or identities without having fully left a previously held position and without fully being part of the next stage in their lives (Louis, 1980).

In this study, I utilized the term career change to address a modification in the contractual work arrangement binding the employee to the organization, while the employee maintains a similar work role and remains in the same corporation, but develops a subjective perception that his/her career has changed (Higgins, 2001; Ibarra, 2003). Proponents of career theory understand two different types of career: objective and subjective. Objective career refers to an individual's clearly identified position, situation, and status in an organization "that serves as landmarks to gauge a person's movement through the social milieu" (Barley, 1989, p. 49). Subjective career refers to an individual's evaluation of his/her career from both a retrospective and prospective perspective, which influences how the individual constructs his/her self-identity according to their current career situation (Stebbins, 1970).

Career transition is often a time when individuals evaluate the present standing in their careers in order to assess what one has accomplished during his/her work life and where one envisioned being at that crucial moment in time (Louis, 1980; Stebbins, 1970). Often at the critical juncture of a career transition, individuals often ask themselves who they are, where do they plan to be, and what they want to achieve and accomplish –thus questioning and evaluating both their personal and professional identity (Stebbins, 1970). Different authors following different tradition of inquiries developed various career transitions theories and models. In this study, I made use of Schlossberg's (1981) transition theory as it provides a broader scope to analyze the topic of localization of expatriates. Given the presumed personal implications of this transition (i.e. long-term stay overseas, transfer from expatriation to immigration), this theory

provided more support to understand the phenomenon of this investigation, addressing issues related to both career and personal life transition.

In addition to utilizing career change and transition theory, I made use in this study of social identity theory as this construct often influences an individual's in his/her career choice and development (Arthur et al., 1989). According to identity theory, the core of a person's identity is the "categorization of self as an occupant of a role, and the incorporation, into the self, of the meanings and expectations associated with that role and its performance" (Stets & Burke, 2000, p. 225). Work and work roles, in special, are significant in shaping a person's sense of self and identity (Dalton, 1989). When individuals change their role, or the perception they have constructed of their work role in a given organization, they often engage in a process of reshaping their sense of self. More specifically, I utilize in this study, Tajfel (1978) and Tajfel and Turner's (1979) social identity theory. The choice of this theory serves to understand the process of social identity construction through the interaction of individuals with both work groups and social groups. These authors posit that social identity is resulting from the categorization and interaction of individuals with other individuals with real or perceived similarities (Tajfel, 1978; Tajfel & Turner, 1979), or the identification of other individuals with similar stories and experiences (Campbell, 1958). These authors posit that a person's social identity is greatly influenced by their membership or identification with particular social categories.

LOCALIZATION OF EXPATRIATES: NEW TREND, LIMITED KNOWLEDGE

As previously stated, I made use in this literature review of peer and non-peered reviewed literature on the topic of localization of expatriate employees, as well as pertinent literature (both of empirical and conceptual nature) on the related topics of expatriation and repatriation. The combined use of peer-non-peered reviewed literature, as well as literature on related topics, was necessary to provide insights onto a topic that limited empirical information is available at this point. I believe, in particular, that making use of the literature on repatriation is a valuable approach, as nowadays the localization of expatriates is becoming an alternative approach to ending the cycle of expatriation of international employees.

The literature of expatriation often present the cycle of expatriation as displaying rigid stages of the international assignment in which people "move out/return to" the country of origin/headquarters organization after an specific period of time spent on an international location (Black, Gregersen, Mendenhall, & Stroh, 1999; Brewster, 1999). Increasingly, however, global companies operate with different types of international employment policies, markedly more complex than the traditional diagram of the cycle of expatriation. Under globalization, multinational companies often adopt different and multiples types of expatriation arrangements in response to the different business needs of the company, and also in accordance to the different purposes and needs for the utilization of expatriate employees (Collings et al., 2007; Mayerhofer et al., 2004; Welch, Welch, & Worm, 2007).

Traditionally, the transferring of an employee overseas follows the purpose of transferring skills and knowledge, providing control and coordination, and assuring that the values and culture of the host organization are adopted by their subsidiaries (Edstrom & Galbraith, 1977). Lately, expatriation has also become a necessary route for the development of leadership in global organizations (Black, Gregersen, et al., 1999; Caligiuri, 2006; Suutari & Makela, 2007). The development of leaders with a global mindset (possessing both global knowledge and skills) has become mandatory in an integrated economy which requires top management to possess a good understanding of operating in a global business environment –from basic business functions to interpersonal interactions to strategic subsidiary development (Black, Morrison, & Gregersen, 1999; Caligiuri, 2006; Caligiuri & Di Santo, 2001; Gregersen, Morrison, & Black, 1998; Oddou, Mendenhall, & Ritchie, 2000).

In addition, companies of all sizes now engage in the global market often since the onset of their existence (Gleason & Wiggenhorn, 2007). Business ventures and partnerships across the globe make companies engage their employees on various types of international assignments (IA). If IAs were once the exclusivity of large multinational firms, they are now more and more the reality of companies of various sizes that venture in the global market in search of business opportunities. Concurrently, companies, particularly those with limited revenues, move towards streamlining the operating costs of international assignments, and increasingly adopt alternative arrangements to the traditional (and often costly) long-term assignments. In consequence, new arrangements have been employed including short-term assignments, commuter assignments, and

frequent flyer strategies (Collings et al., 2007; Mayerhofer et al., 2004; Welch et al., 2007). The localization of expatriates is also one of these arrangements that companies are beginning to implement with the primary purpose of containing the costs of international assignments (Bosson, 2010; Hauser, 2003; Joinson, 2002; Tati et al., 2014; Yates, 2009).

The new diagram of the expatriation cycle thus needs to be updated in order to accommodate this emerging trend. For some employees, the end phase of the international assignment is likely to become their localization/transfer to the foreign location/subsidiary of the company, and no longer their repatriation back to the home culture/headquarters organization. Bosson (2010) argues, "The assumption that employees who work outside of their home country will eventually return is outdated" (p. ix).

The primary motive for localization, in most cases, is cost saving (Bosson, 2010; Hauser, 2003; Joinson, 2002; Yates, 2009). In recent years, companies are moving towards reducing their operating costs, and often look at cutting expenses in employment arrangements that are deemed too expensive. Expatriates are often high-priced employees, costing as much as three to four times their annual base salaries at the headquarters location (Scullion & Brewster, 2001). In addition to above base salaries, expatriates often receive additional perks, such as housing and school allowance, cars, club membership, paid family trips back home, and tax equalization benefits. The use of expatriates is often revisited whenever companies try to implement cost saving strategies. Alternative assignments have been employed in the last decade (Collings et

al., 2007; Mayerhofer et al., 2004; Welch et al., 2007), as well as localization policies have been increasingly adopted (Bosson, 2010; Hauser, 2003; Joinson, 2002; Tati et al., 2014; Yates, 2009).

Additional reasons also dictate the adoption of localization policies. Peer equity is an important reason why companies adopt localization. In circumstances where expatriates perform the same job duties and responsibilities of their local counterparts, companies may elect to localize employees in order to create a more equal treatment among people in the same global organization. This is particularly important among corporations that aim at creating a global business culture, more in tune with local business practices and customs (Bosson, 2010). Differential treatment and compensation disparity among expatriates and foreign-national local employees of the same global corporation have been identified as causing feelings of unfairness and unjust treatment of people, which may lead to difficulties of relationships among professional colleagues (Chao, Choi, & Chi, 2002). Particularly in emerging countries, compensation disparity between expatriates and local employees is often remarkably high, with expatriates earning as much as twenty to fifty times more than the salary of their local counterparts (Leung, Smith, Wang, & Sun, 1996).

Other reasons for adopting localization policies are often related to various changing circumstances in regards to the business environment of the company or the personal and/or professional life of employees. Localization may take place when employees are approaching the termination of long-term assignments (of often three to five years), and do not find acceptable positions back at their home organization. In

some cases, there is a shortage of talent in the host location, and the company may need the expatriate to remain at the overseas location longer than it had initially anticipated. Yet in other cases, employees may have established long-term ties with the host location (e.g., through marriage, and due to children's school) and may opt not to repatriate but rather to localize at the host location of the company (Bosson, 2010; Hauser, 2003; Yates, 2009).

The process of localization of expatriates may take different formats. Many companies still linger in establishing formal localization policies, and often adopt a case-by-case approach. However, this scenario is gradually changing. A 1998 survey identified that 25% of the companies interviewed had a formal localization policy (Joinson, 2002). A decade later, another survey identified that 46% of participating companies had a formal localization policy (Cartus, 2010). Typically, companies initiate the process of localization when assignments reach a specific cutting point –in general of three to five years. Lately, however, companies are localizing employees even earlier (Bosson, 2010).

Specific methods and approaches to localization vary greatly among companies, and are "often driven by company's culture, finances, employee relations issues and/or the history of the expatriate program" (Bosson, 2010). In general, corporations often adopt three types of localization practices: (1) straight approach; (2) phase-out approach; and (3) lump-sum approach (Bosson, 2010).

Straight approach. According to Bosson (2010), the straight approach is the most frequently adopted method of localization. Under this method, all perks associated

with the international assignment are eliminated immediately upon the localization of employees. This means that employees are moved to the local payment structure and benefits of the host location subsidiary as soon as their IA contract expires and the localization takes place. It also means that all perks often associated with expatriate contracts are terminated, including housing, cost of living allowance, tax equalization, and home leave (Bosson, 2010). A 2010 survey identified, that the straight approach is the second most typical approach employed by companies, with 43% of participating companies reporting that this was their preferred method of localization (Cartus, 2010).

Phase-out approach. The phase-out approach is the second most common type of localization practice (Bosson, 2010). Under this approach, the transition to a local package occurs over a period of time –from one to up to three years (Bosson, 2010; Joinson, 2002). Along this timeframe, all allowances are gradually reduced until their eventual elimination. In general, school allowance for children is often granted longer, while other allowances (e.g., housing) are reduced to smaller percentages during the phase-out years (Joinson, 2002). A 2010 survey identified some discrepancy in regards to the preferred method of localization adopted by multinational companies. The phase-out approach was identified as the leading method of localization adopted by 48% of multinational companies operating worldwide (Cartus, 2010).

Lump-sum approach. The third approach to localization is the lump-sum method. This tactic is less common among global corporations (Bosson, 2010). This approach means that companies may pay employees a lump sum benefit to assist during the process of localization. This method allows employees more flexibility in prioritizing

how to use the resources to make sure the permanent transfer overseas is more successful for their spouse and family (Bosson, 2010).

The above three approaches are the typical tactics employed by organizations when moving employees from expatriate to local contracts. Although at this point many global corporations have created localization policies, it is likely that companies still adopt a flexible approach in treating each specific case of localization. This may prove necessary and instrumental in making sure that the company retains their expatriate employees (Bosson, 2010).

Although localization of expatriates is becoming an increasingly popular practice in global organizations, its implementation does not necessarily occur in a straightforward manner. There are often hidden obstacles to overcome when transferring people permanently to the international location. In general, benefits, pensions, and health care plans vary greatly from country to country, and require continued assistance from companies in helping employees figure out their new reality (Bosson, 2010; Joinson, 2002). Because of the novelty of the practice of localization of expatriates, there may be times where unexpected surprises may occur to both companies and employees during this transition. Tax misfiling by employees once moved permanently to the host location, for instance, may create problems for both employee and employers as in some countries, companies are ultimately responsible for the behavior of people they employ (Joinson, 2002).

Localization of expatriates is also not always a suitable option for all host locations of the global organization. In many cases, subsidiaries are located in areas that

are deemed not safe or which the pay scale is not comparable to the original location of the expatriate. In these cases, expatriates are likely to refuse their permanent localization overseas (Bosson, 2010; Hauser, 2003; Joinson, 2002). In other cases, visa and work permits are not easily granted for long-term permanence of employees. As a result, thus the practice of localization is not a viable option to curb the costs of expatriation (Bosson, 2010). A recent survey indicated that the top destinations where localization is most often utilized and needed are: the United States (predominantly), China, and Switzerland (Cartus, 2010).

Expatriates often develop a distinct sense of career identity resulting from their personal and professional experiences during expatriation (Kohonen, 2005). The engagement in international assignments is often a significant experience in one's life, forcing people to adapt and reshape their sense of self. This in many cases results in expatriates developing a boundary less career identity that is shaped more by their acquired skills and competencies rather than by professional engagement to their jobs or to a particular organization (Arthur & Rousseau, 1996; Mirvis & Hall, 1994). In addition, expatriates often develop an "international employee identity" which is defined as "as a degree to which an individual's role as an expatriate has become central to his/her self-concept" (Kraimer, Shafer, Harrison, & Ren, 2012, p. 401). This new identity is socially constructed, and evolves from the relationship of the individual with his/her work-related role, his/her organization structure, and the interaction with both international and local colleagues (Kraimer et al., 2012).

In terms of personal and social identity, expatriates often develop a very specific social identity, rather different from either independent immigrants or temporary immigrant workers. They often integrate less with the local community, live in most cases in expatriate housing complexes where they relate primarily with other expatriates and their families, thus forming a social elite of skilled foreign workers within the international location (Leonard, 2010). The term "expat bubble" is often associated to the expatriate living arrangements and lifestyle while working and living abroad. The term denotes both the isolation and seclusion from the native setting in which they reside but also a distance and disengagement from the previous lifestyle they once held; living in a bubble often implies that expatriates develop a particular social identity very much influenced by the transitional nature of their temporarily state of working and living abroad on an international assignment (Fechter, 2007).

Recent ethnographic studies on transnational elites helped develop a more holistic view of the effects of globalization and the consequent increased movement of skilled workers across the globe on the process of identity creation of employees engaged in international assignments. According to some studies, expatriates develop a double edged identity of partial yet limited integration to their international surroundings; on one hand, expatriates are often well integrated to the local workplace and business environment while at the same time they segregate themselves from the social local sphere, thus actively creating boundaries in which to shape their living space and social identities (Beaverstock, 2002; Leonard, 2010).

CAREER TRANSITION

The moment of termination of international assignments is a significant time of change and transition for expatriates. The literature on repatriation has documented various issues often affecting returning expatriates upon the termination of international contracts. Issues referring to reverse cultural shock, lack of career opportunities, breach of psychological contracts, turnover intention, etc. have been documented as often affecting employees upon their returning to the headquarters organization/home culture (Chi & Chen, 2005; Herman & Tetrick, 2009; Hyder & Lovblad, 2007; Lazarova & Caligiuri, 2001; Lee & Liu, 2007; Linehan & Scullion, 2002; Shaffer, Harrison, & Gilley, 1999). The literature on repatriation has particularly focused on turnover intention among repatriates; it is estimated that as much as 20 percent to 50 percent of returning expatriates leave their organizations within one year of returning from international assignments (Baruch & Altman, 2002; Stroh, Gregersen, & Black, 2000).

Looking through the lens of career change and transition, the repatriation time, or the reentry of the expatriate employees to their headquarters organization/home culture is rather different from other typical career transitions experienced by domestic job changers (Feldman, 1991; Feldman & Thompson, 1993). Expatriates deal with issues that are unique to the situation of working overseas; they are often more isolated from the day-to-day operations of their headquarters organizations, they relinquish contact with the social network of colleagues, they are not always kept on the loop of human resources department, they experience different degrees of professional and personal maturity during the international assignment (Baruch & Altman, 2002; Lazarova &

Caligiuri, 2001). Reverse cultural shock and difficulties in reintegrating to the local organization/culture affects particularly individuals coming back from long international assignments. Typically, it takes six months to one year for repatriates to adjust to their home culture/headquarters organization (Linehan & Scullion, 2002).

As previously stated, expatriates also develop a particular sense of career and personal identity (Kohonen, 2005; Kraimer et al., 2012). Reverting to an older version of self is often traumatic for repatriates upon the termination of IAs (Kohonen, 2008). Turnover intention among repatriates is often a consequence of an altered career identity that motivates expatriates to seek career opportunities in other organizations (Kohonen, 2008; Starr, 2009). Identity strain, or "a person's feeling of tensions associated with his or her international employee identity being inconsistent with the current environment" (Kraimer et al., 2012, p. 401), may cause turnover intention among repatriates.

Turnover intentions are mediated by the perception in employees of organization commitment. Several studies have identified an association existing between organizational commitment to assisting expatriates during the process of repatriation and job satisfaction and job retention among repatriates (Jassawalla & Sashittal, 2009; Lazarova & Caligiuri, 2001; Vidal, Valle, Aragón, & Brewster, 2007). Companies that are perceived to adopt repatriation policies to assist employees during repatriation are well appreciated, which positively affect the intention of employees to remain in the organization. Conversely, repatriate employees often develop negative attitudes towards corporations that do not adopt policies and practices during repatriation and do not show appreciation for the repatriate's work, dedication, and new acquired knowledge and

skills (Lazarova & Caligiuri, 2001; Nery-Kjerfve & McLean, 2012). Work and non-work expectations have been identified as resulting from the employee's engagement in international/expatriate assignments. Returning expatriates often develop expectations that they wish their employers to fulfill upon repatriation. "Only when their expectations are met and there is an alignment between a positive repatriate experience and a fulfillment of motives employees remain committed to their organizations" (Nery-Kjerfve & McLean, 2012, p. 619). Turnover of employees during repatriation often occurs when career opportunities are not in place in the organization, and when repatriates have the possibility of utilizing their newly acquired knowledge and skills at another organization (Stahl, Chua, Caligiuri, Cerdin, & Taniguchi, 2009). Turnover intention is also associated with perceived violations of psychological contracts; employees are likely to leave organizations that they feel did not fulfill the promises and perceived obligations made to them (Lazarova & Caligiuri, 2001).

The literature on repatriation has addressed the influence of a negative experience of repatriation on the psychological contract linking employees to their organizations (Chi & Chen, 2005). Scholars such as Chris Argyris and Edgar Schein first introduced the concept of psychological contracts in the 1960s. It argues that the relationship between employers and employees is intermediated by a set of unwritten rules of reciprocal and promised obligations (Argyris, 1960; Schein, 1965). According to these authors, the breach of psychological contracts often leads to feelings of resentment, dissatisfaction, and turnover intention among employees. Two major causes have been identified as leading reasons for psychological contract violations: reneging and

incongruence (Morrison & Robinson, 1997; Rousseau, 1995). The former applies to situations "when the organization knowingly breaks a promise to the employee, either on purpose or because of unforeseen circumstances" (Turnley & Feldman, 1999, p. 897). In contrast, incongruence occurs when "the employee and the organization have different understandings regarding what the employee has been promised" (Turnley & Feldman, 1999, p. 897).

During repatriation employees often perceive the lack of policies and practices to assist with the reintegration to home culture/home organization, and particularly the lack of career advancement opportunities, as a breach of the psychological contract with their organizations (Chi & Chen, 2005). They assume that their willingness in accepting the international relocation (as well as their willingness to uproot their family's lives and partner's career), and all the work and dedication while working abroad, will be compensated with career opportunities upon the termination of the international assignment (Vidal, Valle, & Aragón, 2007). In many cases, however, repatriates are not granted career advancement opportunities, and are absorbed back to their organizations in positions below their newly acquired knowledge and skills level (Hyder & Lovblad, 2007; Stroh et al., 2000). This bears evidence of a strong disconnect between the expatriate's perceptions and understanding and the corporation's use of international assignments (Jassawalla & Sashittal, 2009; Paik, Segaud, & Malinowski, 2002; Tyler, 2006). For corporations, IAs are employed for various purposes such as knowledge transfer, position filling, control of subsidiaries, and leadership development (Jassawalla & Sashittal, 2009). For employees, IAs are a stepping stone for future leadership

positions in the organization (Paik et al., 2002; Tyler, 2006). The breach of the psychological contracts in situations of repatriation is thus largely for the reason of incongruence, with companies and employees developing a very different understanding of their obligations and promises upon the termination of international assignments (Morrison & Robinson, 1997; Rousseau, 1995).

Repatriation may thus be characterized a moment of intra-career transition of both subjective and objective nature (Leiba-O'Sullivan, 2002). The literature on repatriation identifies this to be a time that requires repatriates to assume an active role in managing their adjustment back to home country/headquarters organization (Herman & Tetrick, 2009; Lazarova & Cerdin, 2007; Leiba-O'Sullivan, 2002; Zivic, Novicevic, Harvey, & Breland, 2006). Thus, successful repatriation occurs when repatriates adopt proactive behaviors (protean approach) in dealing with the challenges of repatriation. The adoption of proactive behaviors by repatriates is often intermediated by both the personality characteristics of repatriates and the characteristics of the firm (Leiba-O'Sullivan, 2002). Still, little is known about what triggers some repatriates (and not others) to adopt proactive behaviors. Zivic and colleagues (2006) argue that both internal and external triggers come to play in prompting repatriates to adopt proactive behaviors. Internal triggers are associated with personality characteristics that lead repatriates to engage in self-exploration of career possibilities, adoption of high degrees of hope, and high expectation regarding the repatriation process. External triggers come in the form of lack of support or lack of career possibilities at their firm because of external factors,

such as firm environment (e.g., downsizing and mergers) or economic environment of the headquarters location (e.g., recession; Zivic et al., 2006).

In conclusion, career change and transition for repatriates is rather different than those experienced by regular domestic changers (Feldman, 1991). Repatriates deal with more challenges and peculiar circumstances as compared to other employees engaged in domestic career changes. In the case of localized expatriates, career transition is likely yet more challenging. Although limited empirical information is available at this point, it is plausible to argue that the event of becoming local, and cutting the ties of residence and employment to one's home culture/headquarters organization, is in itself a pivotal moment in a person's life. Although localized expatriates remain in the same local organization and may (or may not) perform the same work role, the change of contractual work arrangement may affect how localized expatriates perceive both their career and sense of self. If localized expatriates embrace the common view that international assignments are a mean for career development and advancement (Paik et al., 2002; Tyler, 2006), thus exiting the international track of their firms may be perceived as a hindrance to professional growth and development, and may alter how localized expatriates identify their position, situation, and status in the organization –thus their objective career (Barley, 1989); and how they evaluate their retrospective and prospective career in the organization, as well as how they construct their self-identity – thus their subjective career (Stebbins, 1970). In addition, depending of the reasons why the localization took place (e.g. company initiated x employee initiated), localized expatriates may develop feelings of resentment, dissatisfaction, and may contemplate

turnover intentions, if they understand that the company did not fulfill the unwritten agreement with them, thus breaching the psychological contract between the employee and the organization.

SOCIAL IDENTITY

The literature on expatriation has produced sufficient evidence of the impact of international assignments on the identity of employees (Kohonen, 2004, 2005, 2008; Kraimer et al., 2012; Starr, 2009). Expatriates often develop a distinct sense of self and career identity much influenced by the specific characteristics of living and working abroad. Expatriate experiences of living and working abroad, of dealing in a multicultural environment and experiencing the stress of living and working outside one's cultural milieu, is often a transformational experience that challenges taken for granted assumptions of a person's identity, values, beliefs (Osland, 2000). Expatriation is a time that individuals often engage in a reflexivity evaluation of their identities, and may result with expatriates adopting a different identity to that previously help prior to the experience of working abroad (Kohonen, 2004). In many cases, and according to the duration and the intensity of the international assignments, expatriates develop an "international employee identity "which is defined as "as a degree to which an individual's role as an expatriate has become central to his/her self-concept" (Kraimer et al., 2012, p. 401). This identity is socially constructed, and evolves from the relationship of the individual with his/her work-related role, his/her organization structure, and the interaction with both international and local colleagues (Kraimer et al., 2012). Work identities may develop into a person's central identity –which is characterized by a

greater degree of intensity, thus becoming intertwined and significant in shaping a person's sense of self (personal identity) as an occupant of a particular work role (Ebaugh, 1988).

The termination of international assignments may be a time of significant career transition for expatriates who have assumed this work role and status as their central identity. As previously stated, the repatriation time is a moment of termination of the employee's tenure on the international tract of their companies –this situation often grants employees with better access to generous financial packages, as well as more visibility and more career prospective opportunities in global firms. This ending moment of international assignments may thus be a period of both financial loss and career development limitation. Repatriation of expatriate employees is a time marked by many uncertainties – high turnover intentions among repatriates is an obvious indication of the turmoil that this career transition may result in the lives of expatriates (Nery-Kjerfve & McLean, 2012).

In regards to localized expatriates, their career transition is possibly more dramatic and characterized by more uncertainties as those experienced by repatriates. Identity transformation resulting from localization is also likely to be more intense as the permanent transfer of the individual to the international location/culture, through the severing of ties of employment and residence with headquarters organization/culture, is a radical rupture in a person's life. This rupture encompasses various changes of both professional and personal nature. On the personal side, localized expatriates are shifting from a temporary resident status (or time-limited contractual arrangement) to a more

permanent status at the local organization/local place of residence. Considering what is known of the lifestyle embraced by expatriates, this shift may thus assume that localized expatriates are expected to alter how they engage and relate to the local culture. Issues such as developing language abilities, acquiring more knowledge on local customs and practices, etc. are likely to result from a permanent transfer of the localized employee to the international location. On the professional side, localization may alter how localized expatriates perceive themselves and are perceived by local colleagues, organization structure, and other expatriates. Localization is thus a moment of both social and personal identity transformation for localized expatriates.

Various complications are likely to mark the process of identity transformation experienced by localized expatriates. The literature on identity theory gives account of the importance of work activities, relationships, and events in shaping an individual social and work identity (Baumeister, 1986, 1988; Linde, 1993; Tajfel, 1978; Tajfel & Turner, 1979). Following a constructivist stance, the membership to work activities and roles, the engagement in the social network of colleagues, and the events that surround an individual's career history are fundamental to the shaping of an individual's social and personal identity (Ibarra, 2003). In the case of localized expatriates, the changes of contractual employment in the organization and the different social dynamics that may take place between localized expatriates, local colleagues and other expatriates may impact the sense of self as experienced by localized expatriates. Furthermore, given the novelty of the practice of localization of expatriates, localized expatriates may lack a network of colleagues within the firm that share their same situation (of having moved

from expatriate to local contracts). In addition, the novelty of this practice may limit the amount of information and common repertoire of knowledge available to guide localized expatriates during the process of career transition and identity transition. Therefore, one major complication for localized expatriates is the lack of both common knowledge information and a social network of colleagues who may provide information, support, and social validation (Ibarra, 2003; Tajfel, 1978; Tajfel & Turner, 1979) for individuals moving from an expatriate to local contracts within multinational firms. This social network of friends and colleagues, of individuals that share similar stories and life experiences (Campbell, 1958), is often important in assisting individuals' transition from an identity previously held to another yet not fully formed. The novelty of the practice of localization may make the transition from expatriate to local contracts a moment of radical career change for localized expatriates, as well as a moment of significant social and personal identity change for individuals, marked by the lack of both common knowledge and role models who could assist in making this transition more manageable and less drastic.

SUMMARY

In this short literature review, I presented preliminary findings on the topic of localization of expatriates revealed by the limited available literature so far, which included both peer-reviewed and non-peered reviewed, as well as survey data of global mobility of employees. In addition, I drew on the literature of related topics (expatriation and repatriation) in order to compensate for the lack of empirical evidence existing on

the topic of localization. This approach proved to be instrumental in analyzing a topic of which no much information is yet available.

CHAPTER III

METHODOLOGY AND METHODS

Chapter 3 presents the methodology and methods of the study. It starts with discussion of methodological choice. It then describes the participant selection strategy and methods for data collection and analysis. Quality issues and researcher's positionality are also addressed.

METHODOLOGY

This study adopted an interpretive multiple case study design. The choice of this methodology resulted from the particular characteristics of the topic of localization. A case study approach is appropriate when researching new processes, behaviors, or phenomena of which not much information is yet available (Hartley, 1994). A case study design is also appropriate when investigating topics and phenomena that require a holistic and in-depth investigation (Feagin, Orum, & Sjoberg, 1991). This approach is particularly well suited when investigating phenomena in which the boundaries between the context and the phenomena are unclear, or when the context might be relevant to the phenomenon under investigation (Yin, 2011). Case studies are unique compared with other research designs because they allow "an interpretation in context" (Cronbach, 1975, p. 123). Multiple case studies, in particular, are well suited when researching topics in which particular contexts may describe different stories, and the comparison among each particular case may allow the researcher to explore similarities and differences within and between the cases (Stake, 1995, 2000; Yin, 2011). Given the

novelty of the phenomenon of localization of expatriates and the many unknown factors associated with it, in addition to the boundaries of this study, a multiple case study approach was the most appropriate choice of design for this investigation.

Moreover, according to existing literature on localization of expatriates, localization policies are yet to be fully developed by multinational companies; most adopt a case-by-case approach in dealing with localization and tailor their policies to each specific context and circumstance. Further, as I have encountered in this study, the many different ways companies and individuals handle the practice of localization have a significant impact on the way employees navigate this event in their lives. Therefore, an interpretive multiple case study approach was well suited to investigate the phenomenon of localization, which is significantly impacted by each particular context.

METHODS

In this section, I introduce the methods adopted in this inquiry. First, I provide the definition of the unit of analysis, the boundaries, and the context of the case study. Then, I introduce procedures adopted for the selection of participants, strategies for data collection and analysis, and quality control measures adopted in this study.

THE CASE

One central element in utilizing a case study design is clarification of the central core of the case, or the explanation of the unit of analysis (Miles & Huberman, 1994). Patton (1990) defined the unit of analysis as "what it is you want to be able to say something about at the end of the study" (p. 100). Having a clear idea in mind in regards of what the case is, how it is bounded, and what is the main element of the unit of

analysis under investigation is fundamental to the successful use of case study research (Baxter & Jack, 2008; Miles & Huberman, 1994). In the next paragraphs, I thus present the unit of analysis utilized in this inquiry.

The purpose of this study was to explore the emerging international HR trend of localization of expatriates, through the capturing of the experiences of employees transferring from expatriate to local contracts in multinational organizations. Therefore, the unit of analysis in this inquiry was the individual stories of employees who have gone through the process of localization, with a focus on their experiences of career transition, social identity, and status passage. Each participant narrated a story describing the context, reasons, and circumstances behind his/her transfer to a local contract, which played an important role in the shaping of their experiences. Each individual narrative of participants bounded by particular context and circumstances are thus the unit of analysis in this multiple case study.

For clarification purposes, it was not my intention to analyze the program of localization of expatriates in place at any of the companies where the participants were employed. Rather, I focused on the unique stories of individuals going through localization.

THE CONTEXT OF THE CASES

This study was situated in the particular context of employees transferring from expatriate to local contracts in multinational organizations in Sweden and the United States. The context thus differed in regards to the specific context and characteristics of each multinational organization and the country where the localization took place. The

research context plays an important role in any multiple case study inquiry and strongly influences the narrative of participants (Baxter & Jack, 2008; Miles & Huberman, 1994; Yin, 2011).

Eight participants took part in this study–four in Sweden and four in the United States. The participants in Sweden were all employed at one European global organization in the packaging industry. The participants in the United States were employed at three different organizations in different industries, namely, field and oil services, automotive parts, and metals. All organizations made extensive use of expatriate employees but, in recent years, had adopted localization contractual arrangements in handling their international staff.

Context: Multinational organizations. The European company (from here on identified as company A) is a private company in the packaging industry, with about 23,000 employees worldwide. Company A had, until recently, operated in a business environment of reduced competition.

The U.S. companies are: 1) a multinational public company, in the oilfield services, with about 115,000 employees worldwide (company B); 2) a multinational public company in the automotive industry, with about 113,000 employees worldwide (company C); 3) a multinational public company in the metals industry, with about 60,000 employees worldwide (company D). Other details have been omitted to preserve the confidentiality of the companies.

Context: Country of localization. The research context is also marked by the country in which the localization took place–Sweden and the United. The place of

localization played an important role in shaping the experiences of each participant in this inquiry. In this section, I address important characteristics of the country of localization, particularly referring to socio-economic aspects, labor regulations, and tax liability.

Sweden is known for its well-established welfare state model, which has significant implications for labor and employment regulations. A strong presence of the state as the organizing agent of the economic and social life is a trademark of the Swedish model, with the state playing an important role in assuring labor force participation, egalitarian and extensive benefits, and large redistribution of wealth. Workers' rights and protective legislation is paramount in Sweden, where employees experience an environment of great job security and generous benefits, including annual five to six weeks of paid vacation, eighteen months maternity leave for parents, health and life insurances, employer pension contributions, and lifelong pension.

Income equality is also characteristic of Sweden, where marginal tax regulations assure that distribution of wealth is implemented. Tax liability in Sweden applies to any resident of the country, with taxable income rates ranging from 30% to 57%. Sweden is also known for its strong union membership culture and collective bargaining power for employees, which strongly influences the work employment arrangements that companies are allowed to implement (Erixon, 2010).

The *United States* was identified as the top destination where localization is most often utilized (Cartus, 2010). The United States is well known for its market-oriented economy, where firms and individuals have a strong presence in the decision-making

process of the economy as compared with the presence of the state. “U.S. business firms enjoy greater flexibility than their counterparts in Western Europe and Japan in decisions to expand capital, to lay off surplus workers, and to develop new products” (World Factbook, 2015). The U.S. economy is the largest in the world, with a GDP (PPP) of $ 16.72 trillion in 2013, and a nominal GDP per capita of $52,800 (World Factbook, 2015). Among OECD countries, U.S. Americans have the highest average household and employee income (OECD, 2011). The unemployment rate was at 7.3% as of 2013, and the country’s labor force was 155.4 million, including the unemployed (World Factbook, 2015).

Tax liability in the United States applies to any lawful resident of the country, with federal marginal tax rates ranging from 10% to 39.6% (Internal Revenue Service, 2013). U.S. states often also tax income and revenues. In the case of the participants in this study and their U.S. states of residency, the state income percentage rates were 0% (for Texas), 4.25% (for Michigan), and 3.07% (for Pennsylvania). Union membership in the United States is limited as compared to most European countries. In the public sector, 35.9% of employees were unionized, while in the private sector approximately 6.6% of employees belonged to unions in 2012 (Bureau of Labor Statistics, 2013).

In terms of labor regulations for the three states involved in this study, Texas and Pennsylvania adopt the doctrine of at-will employment that prescribes that “any hiring is presumed to be “at will”; that is, the employer is free to discharge individuals ‘for good cause, bad cause, or no cause at all,’ and the employee is equally free to quit, strike or otherwise cease work” (Rothstein, Knapp, & Liebman, 1987, p. 738). Michigan adopts

the doctrine of implied contract exemptions, which states that an employer may not terminate an employee "when an implied contract is formed between an employer and employee, even though no express, written instrument regarding the employment exists" (Muhl, 2001, p. 7).

SELECTION PROCEDURES

This study focused on employees who transferred from expatriate to local contracts while employed at multinational organizations in Sweden and the United States. The selection process adopted was a combination of purposeful and snowball sampling; the former was aimed at engaging information-rich cases to provide the most knowledge possible about the phenomenon of localization of expatriates; the latter resulted from the referral of participants in this study, indicating other people that have also gone through the experience of localization (Patton, 1990).

The following selection criteria were applied: Individuals who at some point in their careers moved from expatriate to local contracts in the identified multinational organizations in Sweden and the United States. While recognizing the value of maximum variation, such was not achieved in this study because of an inability to access additional participants from more than one company in Sweden. The participants in this study include individuals who have been localized: 1) for different reasons, i.e., company initiated, employee initiated; 2) at different stages of employment of expatriate contractual assignment prior to localization, i.e., after short tenure on international assignment or long tenure on international assignment; 3) at different duration of their

tenure on a localized employment; 4) of different country of origin from his/her country of localization; and 5) who remained or not at the organization that localized them.

The initial recruitment of participants was from my professional and personal network with HR directors at multinational organizations. This yielded four participants at company A and two participants at companies B and C. The snowballing yielded two participants total from companies B and D. The final pool of eight participants was considered sufficient for the scope of this project. Yin (2011) stated that there are no definite rules as to the number of cases that constitute a multiple case study. Further, he specified that six to ten cases should be sufficient if the results "provide compelling support for the initial set of propositions" (Yin, 2011, p. 49).

I initially contacted the participants via email, followed, in most cases, by a brief phone conversation with the purpose of carry on an initial evaluation in regards of the selection criteria for this study. On a follow-up email, I provided general information about the project, including IRB information (Appendix A). At the time of the first interview, I provided participants with IRB consent form (Appendix B), and was available to answer any questions they posed. It is necessary to say that I provided participants with IRB information, which stated the research project on two multinational organizations. As I was unable to recruit enough participants from the two organizations I had anticipated to research on, I had to alter the IRB information along the research project. On Appendix A, I share both IRB submission form approvals received months apart.

DATA COLLECTION—METHODS

I utilized semi-structured in-depth interviews (available at Appendix C) as the primary method of data collection. In addition, I also utilized observation and public information records referring to the employment history of participants as a secondary method of data collection. Through interviews, interpretive research attempts "to understand the world from the subject's point of view, to unfold the meaning of their experiences, to uncover their lived world prior to scientific explanations" (Kvale & Brinkmann, 2009, p. 1). The semi-structured format of interviews aimed at introducing particular themes, without restricting the conversation to a closed questionnaire format (Kvale, 1996). In this study, interviews served the purpose of allowing participants to describe and interpret their experiences of localization, reflecting particularly on the evolving of their careers and on their past experiences of transition and identity formation. The goal was to "obtain descriptions of the interviewees' lived world with respect to interpretation of the meaning of the described phenomena" (Kvale & Brinkmann, 2009, p. 27).

Two rounds of semi-structured in-depth interviews were conducted with seven of the participants. With one participant, however, I was able to conduct only one interview because of his time constraints and travel schedule. Nevertheless, I was able to cover in one interview the questions of both interview protocols. The multiple interview approach was based on Seidman (2006), although this approach was slightly modified because of the scope of the study and the busy careers and travel schedules of the participants. Seidman suggested three rounds of interviews with each participant to cover: 1) the

focused life story of the participant; 2) the details of the experience; and 3) the reflection of the meaning. In this inquiry, I tried to cover in two interviews all three focus areas as described by Seidman. Taking into consideration the time availability and the length of description needed by the participants, I tried to cover items 1 and 2 in the first interview and items 2 and 3 in the second interview.

Two interview protocols with open-ended questions were created to elicit rich and meaningful answers from the participants (Patton, 1990). The question format allowed participants to reflect on their experiences of localization. Given the semi-structure nature of the interviews, I was still able to remain flexible in order to pursue additional storylines as narrated by each participant (DiCicco-Bloom & Crabtree, 2006; Kvale, 1996). The interviews were conducted as a conversation between the participants and me (Kvale, 1996; Kvale & Brinkmann, 2009). The interview protocol served mostly as a guide (Patton, 1990), a road map to allow me to uncover the full experience of participants when moving from expatriate to local contracts in multinational organizations.

The interview protocols were divided into four sections: career history, career transition, social identity, and status passage. After the first round of interview with the first participant, I made minor adjustments to the interview protocol to better address the dynamic nature of the interviews. Kvale (1996) suggested that it might be useful for researchers to create two interview protocols with the purpose of dealing with questions of a thematic nature and of a more dynamic and practical nature. The adjustment after

the first interview thus allowed me to create an interview protocol that was more dynamic and practical.

The first round of interviews focused primarily on the career trajectory of the participants up to their entry to the expatriate contract. I addressed issues related to the beginning of their careers, experiences of transition and job change, reasons for accepting of expatriate contract, characteristics of the expatriate contract, and so on. Given the very dynamic nature of the career of most participants, the first round of interview proved to be very necessary in creating a better understanding of the participants' experiences of transferring from expatriate to local contracts. The following questions were included in the first interview protocol:

1. Tell me about your career since you graduated college.
2. Tell me about any job transitions before expatriation.
3. Tell me about any assistance you received during these transitions.
4. Tell me about the beginning of your international career.
5. Tell me about your entry to the expatriate employment.

In the second interview, the following questions were included in the protocol:

1. Tell me about your experiences as an expatriate employee.
2. Tell me about the termination of the expatriate assignment.
3. Tell me about your perception of self (professional &personal) prior to the expatriate assignment.
4. Tell me about your perception of self (professional & personal) during the expatriate assignment

5. Tell me about your perception of self (professional & personal) post termination of expatriate assignment
6. Tell me about the passage from being an expatriate to becoming a localized expatriate.
7. Tell me about the relationship with other employees in the organization at two moments –during expatriate assignment and after becoming a localized employee.
8. Concluding remarks: Please share any information or reflection you wish to add

In addition to interviews, I utilized observation as secondary method of data collection. As described by Guba and Lincoln (1981), observation "maximizes the inquirer's ability to grasp motives, beliefs, concerns, interests, unconscious behaviors, customs (…) provides the inquirer with access to the emotional reaction of the group introspectively" (p. 193). In this study, observation was utilized exclusively in Sweden, where I had the opportunity to visit the site of work of the participants and also had the opportunity to observe the local community of expatriates. This technique of data collection was only modestly adopted in this study. At Company A Sweden, I carried on brief observations while waiting to interview participants, or while walking the corridors of the organization to the location where the interviews took place. Nevertheless, those were unique opportunities to observe the setting where the phenomenon took place and to observe the interaction of participants with colleagues (Patton, 1990). In Sweden, I was also able to carry on unstructured observations prior to the beginning of the research

process among the community of expatriates. As described earlier, these preliminary observations made me decided on this as the topic of my dissertation. According to Guba and Lincoln (1985), unstructured observations allows researchers to enter a "a stage of defocusing or immersion in order to permit the observer to expand his or her tacit knowledge and to develop some sense of what is seminal or salient" (p. 275). Most of these unstructured observations were conducted in public settings –such as coffee houses, and involved people who were not participants of this study. They composed a mix of expatriates; some were employed at Company A but eventually left the organization upon perceiving that they would be offered a local contract upon the termination of their expatriate contracts. I engaged in short conversations with them, and/or observed conversations in which concerns about the possibility of localization was verbalized. Although these observations were undisclosed to participants, I made no attempt to mislead or deceive people, nor did I obscured my identity or misrepresented the reasons for being there. In this study, I utilized this type of covert passive observations (Lugosi, 2008) prior to the beginning of the research process. These preliminary observations were non-intrusive and attempted to preserve the anonymity of the people observed. They allowed me to compose a more holistic understanding of the phenomenon of localization, through observing employees who chose not to localize.

I also consulted public information records referring to the employment history of participants, available through business-oriented social networking sites –LinkedIn, as a method of data collection. These records were easily retrieved, accurate sources of

information (Lincoln & Guba, 1985), which described information at times forgotten by participants in regards of their employment history.

DATA COLLECTION PROCESS

I contacted the participants by email prior to the interviews. In some cases, I followed up with a phone contact with the purpose of doing a preliminary screening to make sure the participants fit the criteria of selection. The two rounds of interviews were scheduled according to the time availability of the participants.

On the first encounter with the participants, on the occasion of the first interview, I gave the participants information about the research project and asked them to sign an informed consent form (Appendix C) stating their agreement to participate in the study. This consent form contained information explaining the nature of the study and of the interview. I made sure the participants understood the content of the consent form, and I was available to answer any questions that they had. The consent form also addressed issues of confidentiality of identification of participants and their organizations. In addition to the consent form, throughout the interviews, the participants and I had frequent dialogues about confidentiality/anonymity. Kvale (1996) argued that this dialogue is important because it "presupposes ideals of egalitarianism and mutuality of interests of researcher and researched that may be hard to find in many actual social settings" (p. 114).

The interviews were conducted from June 2013 through February 2014. All interviews in Sweden were conducted in June-July, 2013. The interviews with U.S. participants were conducted from July 2013 to February 2014. One of the participants

narrating his experience of localization in the United States at the time lived and worked in Sweden as an expatriate employee.

All interviews in Sweden took place at the participants' workplace, either at a private meeting room or at the cafeteria of the company. In Sweden, I was able to visit the operational headquarters of Company A Sweden. This allowed me to gain a better understanding of the organization. I was able to visualize the typical minimalist Scandinavian décor at the organization. I was able to see the frequent transit of employees from overseas locations of Company A visiting headquarters. I was able to see the national flags on display at the organization welcoming the visit of employees from subsidiaries worldwide. I also observed the relaxed dressing style adopted by the employees. Further, I was able to experience the important presence of Company A Sweden in that particular location (city) in Sweden –as they are the largest employer and one of the most well-known companies in Sweden. I was able to have a visual image of a company that is a global leader in its industry. All interviews with U.S. participants were conducted outside of their workplace; either at the participant's home, or at a coffee place. Two rounds of interviews with two participants were conducted over the phone or on Skype.

Elwood and Martin (2000) suggested that an interview site "produces 'micro-geographies' of spatial relations and meaning, where multiple scales of social relations intersect in the research interview" (p. 649). In this study, the interview site was suggested and chosen by the participants. For convenience purposes, the participants at Company A Sweden chose to be interviewed at their place of work during working

hours. The VP of Human Resources at Company A had given their names to me; therefore, there was an immediate agreement to the interview and a consequent choice of their place of work as the interview site. MacDowell (1998) found in her study of bank employees in London that interviewing participants at their place of work affected their behavior. In her study, the participants questioned the appropriateness of being interviewed at their workplace, as they were concerned with confidentiality and were reluctant to share information about their private/family lives. In this study, I did not encounter these concerns with the participants in Sweden; they volunteered much information about their family lives, did not question the appropriateness of the location of the interview, and only in a few instances were concerned with confidentiality issues.

Most round of interviews with each participant were conducted within a week (Seidman, 2006) with the exception of two rounds of interviews (one for a U.S. participant and one for a Swedish participant); those were conducted within a ten-day period. In both cases, this was due to the participant's professional travel schedule. The duration of each round of interviews followed the participant's availability of time and necessity of time to describe his/her experiences. The range of duration of each round of interviews was from 45 minutes to 1:36 minutes.

All interviews in Sweden were conducted in English as the participants were of various nationalities –i.e. Russian, Italian, Mexican, and British. All interviews with the U.S. participants were conducted in Portuguese as they were all of Brazilian nationality, my nationality. Interviewing is often a process of constant negotiation between the researcher and participants (Charmaz, 2006; Kvale, 1996, Lincoln & Guba, 1985;

Patton, 1990). Building and maintaining rapport is often essential for encouraging participants to explore their feelings and reflections during the interview (Kvale, 1996; Lincoln & Guba, 1985; Patton, 1990). Interviewing participants of different nationalities often pose additional challenges because of feelings of unfamiliarity, different values and culture, difficulties in recognizing and comprehending non-verbal cues, among others (Merriam et al., 2010; Shah, 2004).

For my part, there was some initial anxiety before the first interview, particularly with participants from a low-context culture –i.e. British. On the other hand, I felt immediately more confident and less anxious prior to interviewing participants from high-context cultures –i.e. Mexican and Italian, because of sharing with them a similar cultural background (Hall, E. T., 1976). In spite of my initial apprehension, I was able to maintain good rapport with all participants, both in Sweden and the United States. With the participants in Sweden, I was able to converse easily about insignificant facts related to the weather, news, and so on, in order to build cultural bridges whenever there were commonalities between the participants and me (Kvale, 1996; Sands, Bourjolly, & Roer-Strier, 2007; Shah, 2004). In regards of the participants in the United States, I was able to maintain good rapport because of the similar background I had with most of them; I too was a Brazilian living abroad and an immigrant to the United States.

I did not introduce myself as a culture insider when I approached the participants, nor did I feel like an insider when I started the interviews. However, it became apparent during the interviews that I understood well the particular culture of the participants, both the expatriate culture of the participants in Sweden and the Brazilian emigrant

culture of the participants in the United States. Because of my multicultural profile as a Brazilian immigrant to the United States temporarily living in the community of expatriates in southern Sweden, I likely have acquired culture competence (Fong, 2001; Lum, 2007) to deal with the individuals of diverse nationalities and of diverse status of residency. I tried to become aware of any unintended insensitivities to cultural differences during the process of interviewing. The participants and I did succeed in creating an environment of mutual understanding and respect during the interviews. I tried to pay special attention to the different meanings attributed by each culturally different participant in regards to the phenomenon of localization (Tayeb, 2001). I was also cognizant of different styles of communication as in the case of participants of high context culture –i.e. Mexico and Brazil- sharing less information through words but displaying their feelings and emphasis through different tones of voice, gestures, facial expressions; or when participants from low-context cultures –i.e. United Kingdom- were more verbal, very logical and direct in their narrative, but also more modest in displaying their emotions.

To register these nuances and to enrich the description of the narratives, I used thick description (Geertz, 1973), with the purpose of detailing the participants' behaviors, body language, humor, disposition, and responsiveness to the questions (Lincoln & Guba, 1985; Patton, 1990). In addition, I collected personal field notes of the impressions captured during the interviews. These field notes incorporated the recording of cultural particularities of each participant as a means to provide a better understanding of their narratives of localization.

All interviews were recorded on a digital audiotape. The participants authorized this recording, which was explained on the consent form (Lincoln & Guba, 1985; Patton, 1990). Immediately upon leaving each interview, I often organized my field jottings and created a more detailed story line of what had just been narrated. Most of the time I organized field notes immediately after each interview. I used that time as an opportunity to collect my thoughts and to make sure I recorded the fresh impressions I had gathered and the narrative itself. These field notes proved to be very instrumental when analyzing the data and understanding the behaviors and thinking process of participants from different cultural backgrounds. I transcribed all interviews within 72 hours of the recording, with the assistance of the computer software Dragon Voice Recognizer™.

After the transcriptions, I shared with the participants his/her transcript for their input in clarifying meaning and suggesting changes as necessary to confirm accuracy (Lincoln & Guba, 1985; Patton, 1990). Only two participants gave input on the transcript. The others claimed that they did not have time to do so. Only my advisor and I had access to these data.

During the process of coding and data analysis, I kept all interviews in its original text, meaning that I did not translate the entirety of the interviews of U.S. participants from Portuguese to English. All US participants were fully fluent in English; only for convenience purposes they had opted to be interviewed in Portuguese. I chose to maintain the text in its original language in order to expedite the process of data analysis. Only segment of interviews were translated, and are occasionally shared in the findings

section of this dissertation. I myself translated these segments; as a bilingual cultural insider, I was able to capture the meaning of what is being said by participants, and had insight and sensitivity to translate not only words but also the social realities that were being described (Baker, 2006; Irvine, Roberts, & Bradbury-Jones, 2008). In order to ensure the accuracy of the translation, I shared it with a colleague, also fluent in Portuguese and English, for further verification. In this dissertation, I chose as a strategy in handling language issues of participants of Brazilian nationality to share excerpts of their interviews both in Portuguese, their native language, and in English; hence, sharing part of the data in bilingual or native language of participants and researcher (Lincoln & Gonzalez, 2008).

DATA ANALYSIS—METHODS

According to Merriam (1998), case study design "does not claim any particular methods for data collection or data analysis" (p. 10); thus any and all methods may be used for both data collection and analysis in a case study. In this study, I used a constant comparative method for data analysis, as proposed by Charmaz (2000, 2006, 2012). This strategy was chosen because it provides a more robust tool for comparing segments of data within and across sets of data (Charmaz, 2000, 2006, 2012; Glaser & Strauss, 1967). As I used a multiple case study design, I used a thorough comparison between sets of data across each case.

The constant comparative analysis method is an "iterative and inductive process of reducing the data through constant recoding" (Fram, 2013, p. 3) In the constant comparative method, "the researcher simultaneously codes and analyses data in order to

develop concepts; by continually comparing specific incidents in the data the researcher refines these concepts, identifies their properties, explores their relationships to one another, and integrates them into a coherent explanatory model" (Taylor & Bogdan, 1984, p. 126). The particular adaptation of the method suggested by Charmaz (2012) adds an interpretative component to the original method created by Glaser and Strauss (1967). Charmaz's adaptation of the method posits that knowledge results from "past and present involvements and interactions with people, perspectives, and research practices," and any understanding or interpretation resulting from the analysis of a phenomenon is "an interpretative portrayal of the studied world, not an exact picture of it" (Charmaz, 2006, p. 19). Her adaptation also introduces the need for accountability regarding the context of the study, the researcher's standpoint, priorities, and interactions (Bryant & Charmaz, 2007; Charmaz, 2000; Fram, 2013).

Data analysis followed the structured multi-step process suggested by the constant comparative method (Charmaz, 2000, 2006). I initiated the process of data analysis immediately after the first interview was transcribed; data analysis was also done on an ongoing basis throughout the project, in accordance with the emergent nature of qualitative inquiry (Charmaz, 2006; Lincoln & Guba, 1985; Merriam, 2002).

I read the transcripts carefully numerous times to familiarize myself further with the data. I then created color codes to identify each participant. This step allowed me to quickly retrieve information on each participant. It also allowed me to begin visualizing the emerging of initial codes from a quick screening of the data. I then organized all sources of data, including interview transcripts, observation and field notes, and general

information regarding each participant (i.e., business-oriented social networking information about the participant-LinkedIn) in a database or record (Patton, 1990; Yin, 2011). I created this database electronically using the computer software designed for qualitative research (Nvivo™ 10 for Mac). The use of the database served the purpose of:

> pull[ing] together and organiz[ing] the voluminous case data into a comprehensive primary resource package. The case record includes all the major information that will be used in doing the data analysis and case study. Information is edited, redundancies are sorted out, parts are fit together, and the case record is organized for ready access either chronologically or topically. The case record must be complete but manageable. (Patton, 1990, p. 126)

I organized the case record discriminating by each data source, i.e., interviews, observation and field notes, and business-oriented social network information.

DATA ANALYSIS—CODING

I proceeded with the next step of open or substantive coding. A hallmark of constant comparative analysis is the coding of every piece of data (Charmaz, 2006; Glaser & Strauss, 1967). During this phase, all parts of the interviews were coded using different strategies –such as line-by-line, incident-by-incident. Coding served the purpose of beginning to define "what was happening in the data and to begin to grapple with what it means" (Charmaz, 2006, p. 46). Codes were not selected *a priori* but emerged from the analysis. The quality of the codes at this first stage ranged "from simple, concrete, and topical categories to more general, abstract conceptual categories"

(Charmaz, 1983, p. 123). During this phase of analyzing only the participants' transcripts from Sweden, I created 151 open codes that emerged from reviewing of the incidents (Charmaz, 2006). Incidents and codes were then compared to sharpen the understanding of particularities and relationships between them (Charmaz, 2006; Glaser & Strauss, 1967). The Nvivo™ software allowed me to run the initial queries and organize the data in "trees of data", thus making it possible to visualize the emerging concepts and categories. At the open coding stage, 24 concepts resulted from the 151 codes or nodes; an Nvivo™ translation of this statement means that I organized these concepts into 151 child nodes within 22 parent nodes. In addition, I also began to visualize initial properties and dimensions within the concepts (Charmaz, 2006; Glaser & Strauss, 1967).

In the second step of coding, known as focused coding, I took a more selective and conceptual stance in analyzing the data (Charmaz, 2006). The initial concepts were thoroughly reviewed with the intention of generating a useful set of categories; this analysis also aimed at developing an initial conceptual understanding of the phenomenon under inquiry (Charmaz, 1983). By definition, a category is a higher level, more abstract form of concept (Charmaz, 2006). The initial categories resulted from two streams: what was being revealed by the participants through the use of their natural language or the use of the words they chose to a describe a phenomenon (in vivo codes); and my analytic interest. According to Charmaz (2012), the analytic interest of the researcher–i.e. his/her viewpoint, tacit and substantive knowledge, and shifting positions - strongly influences the process of data analysis at all stages of coding. The focused phase of coding involved

lots of back and forth of reviewing categories, rearranging initial established categories with their set of subcategories, then going back to rearrange newly emerged coded categories. At this phase, I also began to identify properties, conditions, and actions/interactions of each category (Charmaz, 2006); this was fundamental to beginning to understand the conditions in which a particular behavior/situation occurred.

I kept detailed informal analytic notes (known as memos) to track my process of data collection and initial analysis. Memo writing was used to: 1) help make sense of initial codes; 2) start to create the first concepts; 3) compare and contrast the emerging categories, and 4) eventually, help shape the conclusion of a study (Charmaz, 2006; Glaser & Strauss, 1967). According to Charmaz (1983), writing memos throughout the research process prevents researchers from being paralyzed by mountains of unanalyzed data and immobilized by the prospect of needing to complete final papers and reports. As a crucial correction to such problems, writing memos throughout the research process sharpens and direct data collection and process.

I initially created memos using a regular notebook; later I transferred these notes to Nvivo™ qualitative software for further analysis. The Nvivo™ software allowed me to link a particular memo to a particular code, and later particular concepts and categories. This was extremely helpful in establishing conditions and actions/interactions among codes, concepts, and categories.

DATA ANALYSIS—FINAL STAGE

The final stage of data analysis (selective coding) focused on creating a storyline to explain the phenomenon. At this stage, I was able to identify a few main categories

that explained the way participants described and experienced their transfer from expatriate to local contracts. The core categories resulted from the constant comparing and refining of previously created categories (Charmaz, 2006). The storyline resulting from this selective coding is understood to be a social construction as perceived and experienced by each participant, resulting from the interaction between participants, sources of data, and me (Charmaz, 2006). The final analysis and the conceptual understanding resulting from this process is also understood to be a social construction, and "is contextual[ly] situated in time, place, culture, and situation" (Charmaz, 2006, p. 131).

The sets of data for the participants in Sweden and the United States were analyzed sequentially. As I interviewed the participants in Sweden before (between June and July 2013), the analysis of their interviews was carried on first. In the findings section of this study, I also presented the analysis of the interviews for the participants in Sweden and the United States sequentially. The findings were then compared across each individual case in order to identify similarities and differences. The multiple case study design allowed the acknowledgement of the impact that each particular scenario (context and circumstances) had on the experiences of employees on becoming localized expatriates. By comparing the findings across the cases, it was possible to compose a more holistic understanding of the phenomenon of localization of expatriates. The multiple case study design provided a robust explanation of phenomena significantly impacted by context through the establishing of similarities and differences across the cases (Yin, 2011).

ESTABLISHING TRUSTWORTHINESS

Establishing trustworthiness is important in naturalistic studies in order to support the findings. Naturalistic inquiries adopt criteria different from conventional criteria of validity and reliability. Qualitative studies are evaluated by criteria of trustworthiness, authenticity, and credibility (Creswell, 2009; Lincoln & Guba, 1985; Merriam, 2002). I achieved trustworthiness and credibility by using five techniques: 1) engagement; 2) triangulation; 3) member checking; 3) memo-writing (Glaser & Strauss, 1967); and 4) keeping an audit trail (Lincoln & Guba, 1985).

Engagement. Engagement helps researchers avoid distortions when observing and analyzing phenomena; it also helps researchers to interpret phenomena without interference of preconceived and biased ideas (Lincoln & Guba, 1985). Because of my life circumstances, I was able to maintain a prolonged engagement with the community of expatriates, and was able to spend a sufficient amount of time observing the phenomenon under investigation. This type of prolonged engagement provided a further understanding of the phenomenon, as well as it enhanced my ability to analyze the findings of the investigation.

Triangulation. I used triangulation by making use of multiple data sources in this study –i.e. interview, observations and filed notes, and records. The use of multiple data sources served to shed light to various aspects of the phenomenon of localization. It provided a more in depth, richer understanding of the phenomenon under investigation (Lincoln & Guba, 1985). I also utilized literature information on different cultural viewpoints in order to better understanding the narrative of participants. This also proved

to be instrumental in anchoring the interpretation of findings, and enhancing the trustworthiness of this study.

Member checking. Member checking is viewed as the most important technique to establish credibility in qualitative studies (Lincoln & Guba, 1985). Member checking serve to demonstrate that the data are reflective of the description provided by participants and are ultimately agreed upon and approved by them (Lincoln & Guba, 1985). In this study, I provided each participant with a transcript of his/her interviews in order in order for them to verify accuracy and make corrections if necessary. They also had an opportunity to volunteer additional information, and to assess their account and to go through their participation in the study. The input of participants was taken into consideration in the final report of findings.

Memo-writing. Memo writing served the purpose of recording my doubts, anxieties, and personal thoughts during the process of interviewing. I documented my feelings and perspectives. Memo writing was used as a means to triangulate my thoughts during the process of data collection and analysis process (Glaser & Strauss, 1967).

Audit trail. Finally, I kept an audit trail during the process of research for this study. An audit trail is defined as a "residue of records seeming from the inquiry" (Lincoln & Guba, 1985, p. 319) that provides a description of the steps and choices made during the process of research. I carefully recorded all activities, steps, and decisions during the process of data collection and analysis in order to enhance the credibility of this study. Keeping an audit trail is a straightforward and relatively easy

technique to serve the purpose of enhancing credibility in naturalistic inquiry (Lincoln & Guba, 1985).

RESEARCHER'S POSITIONALITY

As the researcher is the main instrument in qualitative inquiry (Lincoln & Guba, 1985; Merriam, 2002), I am conscious that I played an important role in this research. The findings were significantly influenced by my interaction with participants and are a reconstruction of the relationship and rapport established during the research process. Thus, it is important that I acknowledge and disclose my personal history, biases, and assumptions and continually reflect on their influence on this study.

PERSONAL HISTORY

I am both an immigrant and an expatriate and hold dual nationalities of Brazil and the United States. For the past four years, I have lived in Sweden because of my husband's employment. My multicultural identity somewhat facilitated my interaction and rapport with participants in this study. In Sweden, I interviewed former expatriates of various nationalities residing and working outside of their country of birth. I, too, was an expatriate in Sweden and thus shared a similar identity with the participants in this study. In the United States, I interviewed participants of Brazilian nationality residing and working in the United States; I am an immigrant to the United States and, therefore, share a similar identity with this group of participants. However, I acknowledge that this particular characteristic has the potential of being a vantage point and also a hindrance. As much as it allows me a cultural insider's perspective, I am aware that too many similarities between the participants' stories and narratives and mine can also harm the

research process. In order to avoid this situation, I kept a reflexive journal throughout the research process in this study. This reflexive journal was used to record my feelings, anxieties, and preliminary understanding of the phenomenon of this inquiry. I utilized this journal prior to and after interviewing each participant and during the process of data analysis. I also sporadically utilized the journal to record my observations during my three-year stay in Sweden when I was observing the phenomenon of localization.

BIASES

As the researcher is the main instrument in a qualitative study (Creswell, 2009; Lincoln & Guba, 1985; Merriam, 2002), it is necessary that I become aware and disclose any biases I may bring to this study. As I interviewed participants of various nationalities, I may have had preconceived ideas or lack of understanding of their cultural background and heritage during the interview process and data analysis. I tried to become aware of these issues and pursued clarification whenever possible of what the participants were actually describing to me. As I also interviewed participants of my same nationality living abroad, I may have jumped ahead and assumed similarities and fast understanding of issues when, in reality, there may have been issues that were not as easily understood as I had initially assumed. I tried to correct this whenever I could, and proceeded in a more cautious manner in follow-up interviews. As I have lived as an expatriate in Sweden, I may have formed my own ideas and interpretations of the expatriate life, according to my own experiences. I am aware that these are biases that I brought to this study, and I aimed to be conscious of the impact this might have had on the analysis of the findings of this research. On the other hand, these circumstances may

have also served as unique vantage points that allowed a deeper understanding of the experiences of expatriation and localization.

ASSUMPTIONS

In qualitative inquiries, the researcher brings his/her own paradigms, worldviews, viewpoints, and beliefs to the research process (Creswell, 2009). Good research requires that researchers make explicit these beliefs and worldviews and become aware of their influence during the research process and writing (Creswell, 2009). Five philosophical assumptions guide qualitative method of inquiry –ontology, epistemology, axiology, rhetorical, and methodological assumptions (Creswell, 2009).

The ontology guiding this inquiry espouses the assumption that reality is a social creation depending on how individuals perceive and give meaning to it (Creswell, 2009; Merriam, 1998; Stake, 1995).

The epistemology guiding this inquiry espouses the belief that, through the close interaction between the researcher and the participants, narratives of reality are best captured and explored. The close interaction of the researcher and participants is a sought-out viewpoint that allows for minimizing the distance and the "objectivity separateness" of the research process (Guba & Lincoln, 1981, p. 94).

The axiology guiding this inquiry espouses the assumption that all researchers bring values to the study and that the information gathered in the field is also value laden. It is thus necessary for the researcher to constant report and check these values and bias during the process of research (Creswell, 2009).

The rhetorical assumption guiding this inquiry espouses the belief that writing needs to convey what reality is through the eyes of participants. The style of writing I adopted in this dissertation aimed to create a thorough descriptive and interpretive report of the research findings (Creswell, 2009).

The methodological assumption guiding this inquiry espouses the belief that the process of research is inductive, emerging from the interaction between the researcher and participants, shaped by the researcher's experiences of collecting and analyzing data in the field (Creswell, 2009).

SUMMARY

In Chapter 3, I presented the methodology and methods used to address the research questions. An interpretative methodology, particularly a multiple case study design was adopted in this study. The novelty of the practice of localization, the many unknown factors associated with the phenomenon, and the possible influence of the context in shaping the experiences of localization were suggested as reasons why the option for a multiple case study research design was most appropriate. I also explained the definition of the unit of analysis and the boundaries of the study, as well as the unique characteristics of the context. Further, I also described the sample selected for this research inquiry, and methods for data collection and analysis. The chapter concluded with a discussion about strategies used for ensuring rigor of the research process and research findings. Issues such as my positionality as researcher, biases and assumptions were also identified as they have potential influences on the research and the way I interpret the data.

CHAPTER IV

FINDINGS

The purpose of this multiple case study was to explore the emerging international HR trend of localization of expatriate employees. Of particular interest in this study was to explore the experiences of expatriates in becoming local employees in multinational organizations located in Sweden and the United States. An interpretive research approach was adopted in this study to capture the nuanced multiple realities as experienced by expatriates during the process of localization. Two research questions guided this inquiry:

1) What are the particular experiences and issues of expatriates of becoming localized employees in a multinational organization regarding career transitions?
2) What are the particular experiences and issues of expatriates of becoming localized employees in a multinational organization regarding social identity?

The interviews yielded a total of 16 hours of recorded conversation and approximately 242 pages of transcripts. Transcription and preliminary analysis were done ongoing during the process of research. I organized the analysis of the data and the report of findings around the two research questions mentioned above. Each individual narrative of localization is thus organized around issues referring to a) career transition; b) social identity. The findings for the participants in Sweden and in the United States were described sequentially. I described the case studies of participants in Sweden first,

with the case studies in the United States described in sequence. The analysis of the narratives of each group of participants yielded several themes and subthemes. In this chapter, the findings were organized in three parts: 1) the demographic characteristics of the participants, 2) the narratives of the participants in Sweden and the United States, 3) the themes and subthemes related to localization in Sweden and the United States.

In this chapter, I occasionally used verbatim quotations from the participants with the objective of providing both illustration and/or better understanding of the narrative. Whenever verbatim quotation is presented, I have indicated in the text and have provided the page number in the interview transcript. The interviews of participants of Brazilian nationality were conducted in Portuguese. Whenever I provided verbatim quotation of their narratives, I provided both the translation and the text in its original native language.

DEMOGRAPHIC CHARACTERISTICS OF PARTICIPANTS

I interviewed a total of eight participants who transferred from expatriate to local contracts while employed at multinational organization in Sweden (N = 4) and United States (N = 4). Each participant was given a pseudonym to protect his or her identity. Of these participants, six were men and two were women. Of the participants in Sweden, three were men and one was woman. Of the participants in the United States, the same gender distribution is also true –with three male participants and one female participant. The participants were from diverse nationalities –Brazilian (N = 4), Russian (N = 1), Italian (N = 1), Mexican (N= 1), and British (N = 1). All participants in the United States were of Brazilian nationality; the participants in Sweden were of the following

nationalities: British, Italian, Mexican, and Russian. The length of time of when the participants worked as expatriate employees before transferring to a local contract ranged from 1.5 years to 9 years. Five participants had only one experience of expatriation; three participants had more than one experience of expatriation in different locations/countries. Six participants had also only one experience of localization; two participants had two or more experiences of localization in two countries (Sweden and the States). The length of time of their experience of localization ranged from 4 months to 10 years. This wide range of time after localization therefore covered distinct and different experiences of employees who transferred from expatriates to local contracts – from recently localized to long-term localized in their organizations/locations. All but three participants continued their employment at the same organization that localized them. All participants in Sweden remained at their organization after localization; while only one participant in the United States remained at his organization after his localization. Table 1 provides a snapshot of participant demographics.

Table 1: Demographic Characteristics of Participants

Name	Age	Nationality	Position	Years as expatriate	Years localized	Country of localization	Reason for localization
Ernesto	40-50	Mexican	Manager	4.5	2.5	Sweden	Employee Initiated
George	35-40	English	Director	5.0	4 months	Sweden	Company Initiated
Olga	40-50	Russian	Director	2.5	2.7	Sweden	Employee Initiated
Paolo	40-50	Italian	Manager	3.0	1.7	Sweden	Employee Initiated
Rosa	40-50	Brazilian	Geologist	6.0	10.0	USA	Company initiated
Pedro	50-55	Brazilian	Vice President	9.0	4.0	USA	Company initiated
Gustavo	40-50	Brazilian	Manager	7.0	2.0	USA	Company initiated
Ronaldo	40-50	Brazilian	Vice President	1.5	6.5	USA	Company initiated

INDIVIDUAL CASE STUDIES—SWEDEN AND THE UNITED STATES

The eight single case studies presented in this section provided detailed biographical and professional information on each participant, as well as each participant's narrative and interpretation of his/her experience of career transition, social identity and status passage upon moving from expatriates to local contracts in their organizations. The individual case studies were thus presented in three sections to address the two research questions of this study: career transition and social identity.

ERNESTO

Ernesto was a chemical engineer, employed at Company A Sweden as manager. At the time of the interview, Ernesto had worked as a localized employee in Sweden for 2.5 years after having been with the same organization at the same location for 4.5 years as an expatriate employee. Before moving to Sweden, he worked at various multinational and local organizations in Mexico. Ernesto was in his mid-forties and had a 25-year career in Mexico and Sweden.

Career transitions. Ernesto experienced various job transitions throughout his career. Since graduating college, he had worked for three different organizations in Mexico, also worked as an independent consultant for one year, and then worked as an international employee, under both expatriate and local contracts, for the past seven years. Ernesto described that some form of job training and preparation marked each of these career transitions, with the exception of his transfer to the local contract. In his narrative, Ernesto elaborated on the importance of training and coaching at each career transition. At the beginning of his career, training was fundamental as it prepared him

for the “real world” (Ernesto, interview one, p. 3) of employment. As Ernesto assumed more managerial positions, the role of mentors and direct coaching became more important than technical training. Upon moving overseas to take on the expatriate assignment, the existence of a mentor was extremely important. Ernesto received constant coaching from his direct boss, a former expatriate himself, with whom he developed a very close bond.

Ernesto transferred to Company A Sweden after having worked at Company A Mexico for about six years. His expatriate transfer was for the purpose of technical development. Ernesto was recruited to Sweden to further develop in his area of work and expertise. He received a two-year expatriate employment contract, with the possibility of renewal for one more year. Ernesto, however, ended up staying in Sweden under expatriate contract for a period of 4.5 years.

Ernesto described his transfer to the local contract as employee-initiated. One year prior to the termination of his contract, Ernesto tried to find another expatriate contract at different locations of Company A worldwide –India, Italy, Mexico. However, he ultimately decided to remain in Sweden on a local contract, in part, for family reasons, that is better schools for the children and superior benefits upon retirement. Ernesto reflected that the option to repatriate to Mexico was not feasible. The only position available at Company A Mexico had been in a different regional part of Mexico. The job itself did not require the level of expertise that Ernesto had acquired during his expatriate tenure in Sweden. According to Ernesto, remaining in Sweden on a local contract was the best personal and professional decision for the whole family.

Upon transferring to the local contract, Ernesto received a one-year transition package to localization; meaning, the benefits of the expatriate contract –rental of a home, school payment for the children, use and maintenance of a car, full payment of taxation in Sweden, annual home-trip leave to Mexico –lasted one additional year. Ernesto did not have any further assistance from Company A to assist during his localization. There were no training programs available, nor any mentors within the organization who could assist with various aspects of the transfer. Ernesto did not know of any other employee going through the transfer from expatriate to local contract at the same time. He was the first of his generation of expatriates to transfer to a local contract at Company A Sweden. As a result, Ernesto relied on his wife to figure out the various unknowns associated with his long-term stay in Sweden, for example, purchase of a home and taxation regulations in Sweden.

Social identity. Ernesto's narrative of social identity prior and post expatriation was intertwined with his personal story of employment at two organizations where he worked longer –Company A Sweden and Mexico and a U.S. multinational organization where he worked for 13 years in Mexico. Ernesto reflected that he greatly enjoyed the U.S. organization because of its strong culture, which created a great sense of belonging in employees. In contrast, he noted that he never felt this way towards Company A, both during his time of employment in Mexico and Sweden. Ernesto acknowledged that he never felt part of the working team at Company A Mexico, nor did he feel well integrated to Company A Sweden. Ernesto also noticed some changes in his relationship

with local colleagues; they started to refrain from Ernesto and began perceiving him as another competitor for job positions.

OLGA

Olga was an accountant by training, employed at Company A Sweden as a director. Olga had worked as a localized employee in Sweden for 2.7 years after having worked 2.5 years, at the same location/organization, as an expatriate employee. Olga was of Russian nationality. However, she transferred to Sweden from the United States, where she initially worked as an expatriate employee and later as a local employee. Her career started in her native Russia, where she was employed at various small size organizations before joining Company A Russia. Olga was in her early forties and had a 21-year career, of which 19 years were spent at Company A in three different locations - Russia, United States, and Sweden.

Career transitions. Olga started working part-time at various small organizations in Russia while still in college. She joined Company A Russia immediately upon graduating college. At this organization, Olga had numerous career transitions, from assistant accountant at the start of her career in Russia to the position of director at Company A headquarters in Sweden. Based on her experiences with job transitions, Olga considered technical training less important; shadowing experiences and direct coaching from her bosses were always more effective. Upon moving overseas (to the United States and later to Sweden), Olga recognized the critical role of a mentor (in the United States) or the network of colleagues (in Sweden) in assisting with her transition.

Olga's first international relocation took place in 1999 when she was transferred from Company Russia to Company A USA on an international transferee contract. Her personal motive to accept the expatriation was to study MBA in the United States. Olga held the expatriate contract for two years. Upon transferring to a local contract, Olga received a job promotion, as well as the company's financial support to study MBA. Another job promotion occurred upon her MBA graduation.

After ten years in the United States, Olga relocated to Sweden on a second international transferee contract. Company A was closing down the plant where Olga worked. Part of the employees of Company A USA was transferred to the company's headquarters in Sweden to continue with production of a particular product. Not all transferred employees had a similar contract. Olga's husband, for instance, transferred to Sweden on a local contract with Company A. Olga transferred to Sweden as a local U.S. employee. She was granted a two-year international transferee contract. The United States was established as her home country. Her expatriate contract covered the costs of home rental, tax return in Sweden, paid home leave travel.

Olga described her transition to work in Sweden as "very difficult" (Olga, interview one, p. 7). She experienced numerous problems with childcare for her infant daughter. Olga noted that Company A Sweden and its HR department were not prepared to address the needs of a female expatriate employee. In addition, many management changes were taking place across the organization. Olga did not have an immediate boss for her initial two years in Sweden. For this reason, Olga was granted a six-month

extension to the expatriate contract upon the arrival of her new boss, who later offered her the option to remain at Company A Sweden on a local contract.

Olga described her transfer to the local contract as employee-initiated. For family reasons, i.e. aging relatives in Russia, husband's employment at the same location, Olga and her husband decided to remain in Sweden. Olga was initially reluctant to localize in Sweden; her desire had been to return to the United States. That, however, meant finding two job positions in the same subsidiary of Company A USA.

Upon transferring to the local contract, Olga received two-lump sum payments, one year apart, to compensate for the loss of the expatriate benefits. There were no particular training or assistance available to Olga during her localization. Olga was invited to attend a new employee training session, which she never did attend because of her busy work schedule. The support of the global mobility team and the relocation service, available during the years under the expatriate contract, came to an immediate halt with the localization. This created numerous problems for Olga and her family.

Social identity. Olga described that she did not experience any major difference in the workplace. Her professional identity remained the same after the transition to a local contract. She kept the same job position; she dealt with the same colleagues who were largely unaware of the fact that she had become a local employee in Sweden. There were also limited changes to her social identity. She noted, however, that upon moving to Sweden she had already adjusted her lifestyle to the high cost of living in Sweden. The decision to remain in Sweden had been very difficult. Olga and her husband initially did not agree on what path to take after the termination of the expatriate contract. Her

husband wanted to stay in Sweden while Olga wanted to return to the United States. Although she ultimately agreed to remain in Sweden on a local contract, she noted that she had still not fully accepted the situation. Olga's biggest source of dissatisfaction was the high taxation in Sweden, which significantly reduced the family income after her transfer to the local contract.

In her narrative, Olga addressed her long-term career and personal goals. She wanted to leave Sweden at some point. She did not think she belonged in there, and could not see herself living in Sweden for many years. At the time of interview, Olga had lived in Sweden for five years, and still did not speak Swedish. Her lack of language abilities created various problems, including not understanding of Company A's internal communication and access to training.

PAOLO

Paolo was employed at Company A Sweden as a manager; he had a degree in Physics and Nuclear Energy. Paolo worked as a localized employee in Sweden for 2.7 years after having worked 3 years, at the same location/organization as an expatriate employee. Paolo was of Italian nationality. Before moving to Sweden, he had worked at various multinational organizations in Italy. Paolo was in his early forties and had a 25-year career in multinational organizations in Italy and Sweden.

Career transitions. Paolo started his career in the field of ISO certification because of lack of professional opportunities in his area of training. He worked at two European multinational organizations before joining Company A Italy. Paolo noted that some form of training and preparation had always been available at most of his career

transitions, although the intensity and the quality of training varied from employer to employer. Technical training and mentoring relationships helped prepare Paolo prepared for each career transition. Upon joining Company A Italy, Paolo had vast experience in the field of ISO certification and quality control, which was an area that Company A was beginning to invest. He engaged in intensive development training, and experienced great professional growth at Company A Italy. Company A also advanced significantly in Paolo's particular area of work, increasing exponentially the production of one of its product components.

Paolo was recruited to Company A Sweden, in 2009, with the charge of replicating a similar work production at the company's operational headquarters in Sweden. His transfer to Sweden was for technical purposes. Paolo was granted a two-year expatriate contract, with an option for a one-year extension. The transition to work in Sweden was very confusing to Paolo. He faced serious challenges with unsolved issues re his expatriate contract, such as access to company's internal IT system, salary payments, and access to medical system. These challenges made him unable to work effectively during the initial months. Paolo initially did not know any other expatriate employee, or any other employee of Italian nationality at Company A Sweden. His social network of contact was the network of expatriates that he and his family met at the international school their children attended.

Paolo's transfer to a local contract was employee-initiated. At the end of his three-year expatriate contract, Paolo applied for a job position at another sector of Company A Sweden. He did so after realizing that his repatriation to Company A Italy

was difficult; another employee had been permanently hired in his position. Paolo also considered applying for other positions at Company A worldwide but ultimately decided to remain in Sweden. His decision to transfer to a local contract at Company Sweden was greatly influenced by lack of a career plan available at the termination of his expatriate contract.

Upon his transfer to a local contract, Paolo started working at another section of Company A –research and development. This section had a completely different culture, different demands, and different philosophy as compared to his previous working unit - supply chain. After eleven years at Company A, Paolo felt as if he was joining a new employer. This, he described, was at the same time frustrating and exciting.

Company A provided Paolo only limited benefits upon his transfer to the local contract. He was able to maintain only part of his house allowance, and received support to move his furniture to another residence. He did not receive any additional support or assistance from HR department or a relocation service.

Social identity. In Paolo's narrative of social identity, he reflected on the great disparities between salaries of expatriates and local employees. He noted that this disparity often led people to overestimate their own abilities in securing future employment. Paolo observed among his colleagues a traumatic transition after expatriation, with families not adjusting well to the reduction of income. Paolo did not experience a similar traumatic transition. During his tenure on the expatriate contract, he and his family did not significantly alter their lifestyle. Rather, they used the extra income to pay off their house in Italy, and fully understood the time under expatriation

as a temporary employment situation where he was granted superior benefits and income. The transfer to a local contract had however its challenges, in part because of Paolo's job transfer to a completely different sector of the organization. Further, Paolo also engaged with a very different network of colleagues, and significantly decreased his interaction with any expatriate employee. Most of his original group of expatriate colleagues had either moved on to their next assignment, or moved back to their home country/home organization. New expatriates were coming to Company A Sweden but Paolo felt he no longer belonged to that group. In his words, he was no longer an expatriate employee but only a "foreigner in the country" (Paolo, interview two, p. 17).

GEORGE

George was a mechanical engineer (with MBA degree), employed at Company A Sweden as director. At the time of the interview, George was working as a localized employee in Sweden for 4 months after having worked 5 years, at the same location/organization, as an expatriate employee. George was of British nationality. Before moving to Sweden, he had worked at one U.S. large multinational organization in the United Kingdom, and also worked as a consultant at a U.S. consulting firm in England. George was in his late thirties and has had a 19-year career both in the United Kingdom, Sweden, and during his time as a consultant, in various countries in Europe.

Career transitions. Throughout his career, George worked for three different employers, and had various career transitions. In most job transitions he experienced, some form of training and preparation was always available. At George's first employer, in particular, a robust training program was in place since his entry to the

organization, and throughout the first two years of employment. At this organization, George took part in a combination of technical training and shadowing experiences, as well as nine-month rotation job experiences in different sectors of the organization. Furthermore, he independently pursued additional training (mostly online) offered by his employer. At George's second employer, shadowing experiences were very helpful in assisting during his career transitions. Upon joining Company A Sweden, George had the valuable support of a mentor, who was fundamental in guiding/mentoring him during his tenure under the expatriate contract.

George's entry to Company A Sweden was unique. In fact, his narrative of both expatriation and localization was very unique. George was invited to join Company A Sweden when he was working for the organization as a consultant, employed at a U.S. consulting firm based in the United Kingdom. George had valuable technical knowledge that was highly in demand at Company A Sweden. The negotiation process for George's hiring extended over a period of approximately six months. George initially had no intention of leaving his employer to move to Sweden. As an incentive to join the organization, Company A offered George its most generous expatriate package. In addition, Company A created a very flexible and generous work arrangement to allow George 's family to remain in the United Kingdom, including paid weekend trips to the United Kingdom and health and social benefits in the United Kingdom. George ultimately accepted the contract as it provided superior quality of life and job security in comparison to his work as a consultant.

George's transition to work in Sweden was rather stressful. Upon joining Company A, he assumed additional and challenging job duties while maintaining job responsibilities of his time working as a consultant at Company A. His workdays lasted approximately 18 hours. He commuted to the United Kingdom on the weekends to visit his family. The transition was, however, manageable because of the support of a mentor and a small team of colleagues, who made George feel appreciated. This group was in fact critical in convincing George to join Company A, and in helping him secure an attractive contract of employment.

During his tenure under the expatriate contract, George was identified as a high potential employee. He had two important job promotions, and increasingly received more challenging job responsibilities. He had a few conversations with his immediate boss regarding his future career positions. Company A had indicated an intention to transfer George to another side of the business/global location, in preparation for a higher management position, possibly of vice-president. George's family, however, was not keen on leaving the United Kingdom, his wife would only agree to follow George on an international assignment to few places in the world, United States, Australia and New Zealand.

At the five-year mark, the maximum time allowed at Company A for an expatriate contract, George was pressured to transfer to a local contract in Sweden. His localization was thus company-initiated. George initially had no intention to become a local employee in Sweden. The possibility of transferring to a local contract had never been presented as a possible employment outcome after the termination of the expatriate

contract. In contrast, George's boss had always presented this option as a negative move because of the significant reduction of income. At that point, Company A had just begun a review of its global mobility policy. In addition, various management moves were taking place in George's sector of the organization. Company A Sweden greatly needed George's technical knowledge and competencies.

George's negotiation of a local contract was a "very painful" (George, interview 2, p. 16) and long process, plagued by many uncertainties. As Company A was reviewing its global mobility policy, there were no clear rules and policies in regards to the transition package to a local contract. The negotiation took approximately six months. George was a tough negotiator; he was determined to secure a good transition package, otherwise he was ready to leave Company A. Ultimately, he was granted a very generous transition package, with declining benefits extending over a four-year period. His immediate loss of income in the first year and second year were significantly small. George later realized that the benefits he was offered were superior to what other employees were able to secure. This was possibly resulting from a combination of factors, that is his transferring to a local contract at the very time Company A was revising its global mobility policy; a need for continuity of talent at his sector of the organization; George's technical skills and competencies; George's ability to negotiate a better contract.

Social identity. At the time of the interview, George had been a localized employed for only four months. He had not noticed any significant difference to his social identity. George remained in the same job position; his daily routines did not alter

in any way at this very initial time of localization. He continued working with the same group of colleagues. No change occurred in his interaction with them. Differently from the other participants, however, his transfer to a local contract was a very apparent move in the eyes of his immediate colleagues. George had shared much information with his work team during the very uncertain time of contract negotiation. George's personal life had also not altered. He still traveled back and forth between Sweden and the United Kingdom on the weekends.

George's narrative was unique in some aspects because he never did live as a typical expatriate employee in Sweden. He travelled to the United Kingdom every weekend. In some ways, he continued living the lifestyle of a typical consultant employee. George noted that the term "expatriate" had never been relevant to him. Upon joining Company A, he cared exclusively that the company met his contractual demands. They did so by offering him the expatriate contract. However, both the term "expatriate" and any social identity associated with it were irrelevant to him.

George noticed, however, that the transfer to a local contract did cause him to change his outlook toward his long-term career plans. He started to contemplate the possibility of remaining long-term at Company A Sweden, especially if future career promotions helped to raise his salary. He also started to develop more ownership towards Company A. While on an expatriate contract, George never felt he had much stake in the firm because of the temporary nature of his employment in Sweden. Upon his localization, he began to feel more engaged in the long-term plans of the company.

GUSTAVO

Gustavo was an oceanographer, employed at Company B United States as manager. At the time of the interview, he worked as a localized employee in the United States for the past two years after having worked for a period of seven years (not continuously) as an expatriate employee at subsidiaries of Company B in United States, Brazil, Mexico, and Angola. Gustavo was of Brazilian nationality, and is in his mid-forties. He has had a 25-year career in the oil services industry.

Career transitions. Gustavo started his career at Company B Brazil in 1988, immediately after graduating college. Gustavo was the only participant to have worked for only one employer during his lifetime. At Company B, he had various career transitions, including transferring a couple of times between expatriate and local contracts. Gustavo worked on expatriate assignments in the United States, Brazil, Mexico, and Angola.

Gustavo's career at Company B began in an unusual manner. He was initially hired by Company B Brazil, which did not exist at that time. So he was immediately transferred to the headquarters in Houston, TX, on an expatriate contract, for training. As Company B Brazil was never established, Gustavo was formally hired by Company B USA. He transferred to a local contract and was granted a longer work visa in the United States. At that point, Gustavo engaged in three-year multi-step training and further services available at the organization, a ten-year career plan was developed for him, detailing his job expectations, salary level, and possibilities of career promotion. This

training was designed for local employees. Any form of cultural and practical training or preparation to work in the United States was only modest.

Approximately seven years after moving to the United States, Gustavo married an U.S. citizen, and soon after had his first child. At the same time, Company B sponsored his application for permanent residency in the United States. In 1998, at his ten-year tenure at Company B, Gustavo was transferred to Brazil on an expatriate assignment. Gustavo initially received extensive expatriate benefits, which were later withdrawn because of his Brazilian nationality. Because of the downturn of business in the oil industry, Gustavo was transferred back to the United States after only one year. He was hired on a local contract, a grade-level below his last position, as a major layoff was taking place throughout the organization. A couple of years later (2002), Gustavo transferred again overseas on an expatriate contract to Mexico; three years later (2005), he returned to Company B USA on a local contract. In each transfer, Gustavo slightly altered his job positions. In most opportunities, Gustavo had actively positioned himself to secure a future job position, in different projects taking place in various global locations of Company B. In 2008, Gustavo transferred again overseas on another expatriate assignment to Angola. This transfer was plagued with more challenges, such as high cost of living in Angola, family's difficulty to adapt to the country, and early return of his family to the United States. Three years later, Gustavo transferred again to the United States, on a local contract. At the time of the interview, Gustavo held a local contract with Company B USA but indicated his intention to try to secure another expatriate assignment as soon as his daughter started college.

Social identity. Gustavo's narrative of social identity suggested a significant difference in regards to how he perceived his social identity while working under expatriate and local contract. His perception was greatly influenced by the nature of the industry and the organization culture of his employer. Company B is a global company in the oil field services. A large number of its employees work in the field, often employed in remote overseas locations. In Gustavo's words, these employees are perceived as of high value to the organization as they are "in the field, making money for the company, they are people of high value because of their flexibility of working anywhere. This is how they are perceived. They are for sure highly-talented people, it is very hard for anyone less talented to last in this environment" (Gustavo, interview 1, p. 14). In addition, Company B adopted both global outlook and workforce diversity as part of its guiding principles. The company hired employees of diverse nationalities and encouraged global mobility among its workforce.

Based on Gustavo's observation, employees at Company B who were engaged in expatriate assignment had better chances to progress faster in their careers. Once engaged in the international track of the firm, employees had more visibility and access to other expatriate assignments. Because of the very nature of the industry, "the company needs employees that display flexibility, they need to send people to projects in faraway places, often a person who had been an expatriate [will also take the next opportunity]" (Gustavo, interview 1, p. 10).

Gustavo also noted a great difference in his interaction with colleagues while under expatriate or local contract. In his experience, the transition to work groups and

routines was easier during expatriation. There was an immediate recognition of the person as a new member of the community (of work and of residence) and an immediate readiness of others to assist with the transition. In contrast, he did not experience an equally easy transition to work groups while working on local contracts in the United States. He noticed that work groups were already formed and were less open to accept new people. There was greater diversity among the employees at the headquarters in the United States. Hence, it was thus less easy to identify people in the same situation in order to form an immediate group of support. Gustavo also noted that his adjustment period was longer while working as a local employee. In his experience, it took him about two months to get acquainted with work groups at international locations when he transferred as an expatriate, and about six months to get accepted by his work groups when he transferred as an local employee.

ROSA

Rosa was an oceanographer with a Ph.D. degree in Geology, currently employed at Company X USA. Rosa previously worked as an expatriate employee at Company B, in Argentina and United States, for a combined period of six years. At Company B USA, Rosa transferred from the expatriate to local contract. She later resigned from this organization. Rosa was of Brazilian nationality, and is in early forties. She has had a 22-year career in the oil field industry.

Career transitions. Rosa started her career in her native Rio de Janeiro, Brazil. She worked in the oil industry since graduating college, at both multinational and local organizations. Rosa was hired at a recently opened Company B Brazil in 1998. She was

immediately transferred to Argentina, on an expatriate contract, for training purposes, while the Brazilian subsidiary was preparing to launch its activities. Because of the economic downturn of the oil industry in South America, Rosa was transferred to Company B headquarters in the United States, also on an expatriate contract. After six months, she was granted a different expatriate contract, and was given a longer work visa in the United States. At Company B USA, Rosa took part in intense training for the initial three years. She also worked closely with a senior team of technicians who served as her mentors.

In her personal life, Rosa married an U.S. citizen, and self-initiated the process of application for permanent residency in the United States. Her husband was also employed at Company B USA. During her five-year tenure on expatriate contract, she tried to find another contract overseas. She was however unable to find a subsidiary who could employ both she and her husband. Rosa also returned to graduate school to pursue a Ph.D. degree.

Rosa transferred to a local contract after five years of expatriation. Her localization was company-initiated. There was no reduction of expatriate benefits over time. At the end of the five-year period, all benefits of the expatriate contract came to an immediate halt. Rosa did not know any other employee going through localization at the same time. Her network of personal friends and family in the United States served as her support group during the transition. The localization did not cause major changes to Rosa's professional life. She kept her job position and dealt with the same work group; the only difference was the loss of the benefits of the expatriate contract. Rosa reflected

that the company should have given her a promotion with a pay raise at the time of localization. Without this promotion, it became difficult for Rosa to manage her family finances.

Rosa left Company B USA less than one year after her localization; her main motivation to leave was the significant reduction of income. She was offered a job at an U.S. company in the energy industry, also located in Houston, TX. Rosa had received other job offers before. Up to that point she could not accept them because she did not have her permanent residency in the United States, and also the expatriate financial package at Company B was very attractive. The new organization offered Rosa a more attractive financial package as compared to the local contract of Company B USA. In addition, the new employer offered to pay for the cost of Rosa's Ph.D. education and agreed to give her flexible time to work on her dissertation. At about the same time, Rosa's husband also left Company B USA to start his own business.

Rosa remained at this second organization for six years. She left this organization to join a Brazilian company in the oil industry. At the time of the interview, Rosa had been employed at this organization for about 1.5 years. Her position was geophysicist; she held a local contract with this organization.

Social identity. Rosa acknowledged a significant change of social identity upon her transferring from expatriate to local contract. The changes were related to her professional and personal life. At Company B, Rosa felt that her chances of a global career (another international assignment) and further career growth were limited with her localization. Although in principle all employees had equal opportunities for an

expatriate assignment via the company's online platform for job posting, Rosa felt that employees on expatriate contracts had a better chance of securing future assignments, given, among other aspects, their time restrictive visa situation. In addition, she noted that expatriates had superior chances for career growth. She observed that current or former expatriates often advanced to key positions at Company B USA. Rosa noted that after transferring to a local contract, employees would often remain on the same job position for years without being given a promotion. She believed that her permanent residency status created a difficult situation for her at Company B; it required her to reside in the United States permanently, thus making her less globally mobile, which she believed was a prerequisite for career growth at Company B USA.

Rosa described that upon localizing, her focus of interest immediately changed. She started to pay attention to career and development opportunities in the region. Upon changing jobs, she joined an organization very different from Company B. This company focused largely on U.S. continental projects and had a limited global outlook. Rosa's job was also very different. She began working on onshore projects and no longer on offshore projects. This represented a significant change that resulted in Rosa's identity changing "from being global to being more U.S. focused, more concerned with issues related to the United States" (Rosa, interview 2, p. 2). She also began working with a different work group, composed of people who have spent most of their professional lives in the United States. She recalled that most of her co-workers had spent 30-40 years in the same region. This was a stark contrast to her previous work group composed largely of global mobile employees.

In her personal life, there were also dramatic changes. At that point, Rosa had two children, her husband had started his own business, they were homeowners; she became more grounded in the United States. In her words, "leaving the state of Texas had become impossible" (Rosa, interview 2, p. 3). Rosa described that the family felt comfortable investing long-term in the region, as the city of Houston was "perhaps the capital of the oil industry in the world (…) one may grow in their career without ever living [Houston]" (Rosa, interview 2, p. 3). The transition from being an expatriate to becoming an immigrant was, however, not always easy. After six years on an expatriate contract, Rosa had anticipated that she would have a long-term international career, moving constantly between countries for her next assignment. Upon localization, she realized that she was in fact establishing herself in the United States. In her words, " I was putting down roots in a country that was not mine; I was staying here forever". She described this period as a "very real and slow psychological transition" (Rosa, interview 2, p. 6) that took place over time.

PEDRO

Pedro was a psychologist, currently employed at Company Y USA as director. Before joining this organization, Pedro had worked for 29 years at Company C, a U.S. multinational organization in the metal industry. Pedro worked at Company C in Brazil and the United States. He worked as an expatriate employee in the United States for nine years before transferring to local contract. At the time of the interview, Pedro had been working on local contract for the past five years, initially at Company C and later at another employer. Pedro was of Brazilian nationality, and was in his early-fifties. He has

had a 30-year career in human resources in multinational organizations in Brazil and the United States.

Career transitions. Pedro started his career at Company C Brazil while still in college. At this organization, Pedro had various career transitions, including from a student intern at one of the company's subsidiary in Brazil to the position of global vice-president of human resources in the United States. At Company C, Pedro engaged in both training and mentoring relationships throughout his career. Pedro noted that the role of informal mentors and coaches was more important than most training sessions at each of his career transitions.

In the year 2000, Pedro transferred to Company C USA on an expatriate contract. He became human resources director for Latin America based at one of Company C's facilities in Texas. His job duties were to establish HR processes at a large-scale manufacturing facility, employing 32,000 employees in Mexico. His expatriate contract covered the costs of housing, utilities, annual airline tickets to Brazil, participation in the company's pension plan, and income adjustment for U.S. taxation. Pedro did not receive much assistance and training upon joining Company C USA. He relied on the assistance of a mentor –his immediate boss, with whom he established a very successful work partnership.

Pedro remained in the same position in Texas for almost nine years. In 2007, Company C sponsored Pedro and his family's application for permanent residency in the United States. He was granted the green card subsequently; the company however still retained him on an expatriate contract for an additional period of two years. Pedro

explained that the company did so because of an acute business need for retaining his talent. He was in charge of negotiation with international organizations regarding labor regulation, at the time when the company was in the process of selling part of the business.

In 2009, Pedro transferred from the expatriate to local contract at Company C USA. Meanwhile, he also transferred to another location of Company C USA, Ohio. He assumed the position of global HR vice president. This was minor promotion, seen by Pedro as a lateral career move. Pedro reflected that at Company C USA he did not have many more possibilities for career growth. The transfer to a local contract was company-initiated. Pedro and his family were at that point prepared for the transfer. They no longer had plans to return to Brazil after a nine-year stay in the United States. He and his family somewhat welcomed the transfer to the local contract. Despite the reduced income, Pedro was guaranteed a long-term job and no longer had the risk of being sent back to his home country/home organization in Brazil. The transition to the local contract was relatively easy for Pedro. His family was by then fully adapted to life in the United States and had long prepared for the upcoming reduction of income. He described that they enjoyed the extra benefits during the expatriate contract, and "saved [money] for as long as we could" (Pedro, interview, p. 7). Pedro did not know any other employee going through the transfer from expatriate to local contract. He did not have any mentor to guide him through this transition. However, he had he had served as a mentor to other employees going through the process of localization after him. As a

professional of HR, Pedro had guided and provided resources to many employees going through career transitions.

Pedro remained at Company C USA for approximately three years after his transfer to a local contract. He left the organization in search of better career opportunities and further development. Pedro wanted to work at another type of industry to expand his professional knowledge. So he joined Company Y USA, a smaller global organization in the manufacturing industry, also located in Ohio.

Social identity. In terms of social identity, Pedro described the transition from expatriate to local contract as part of his personal narrative of living and working in the United States for the past 14 years. He highlighted issues related to his adaptation to work life in the United States, and his family's adaptation to American life while preserving their Brazilian heritage. Pedro described that his professional identity evolved to absorb ways of behaviors and identification with the U.S. corporate environment. He noted that he identified himself more with U.S. work values and behaviors than with Brazilian values. Pedro recognized that he still spoke with an accent and displayed at times a quirk sense of humor but by most parts he embraced U.S. work values and behaviors. On the other hand, Pedro proudly described that his personal identity still remained largely Brazilian. His family still spoke Portuguese at home; his children communicated among themselves in Portuguese, even after spending most of their lives in the United States. The family felt adapted and integrated to life in the United States but maintained their Brazilian heritage. Pedro said that they had numerous Brazilian friends in the United States, about five to six hundred families that they had befriended

through a Brazilian Church and Philanthropic Center in the U.S. northeast. The Brazilian community in the United States had served as a resource to Pedro and his family during his adaptation in the United States.

RONALDO

Ronaldo was an engineer, with further training in human resources and an MBA degree, employed at Company Z Sweden as vice president. At the time of the interview, Ronaldo had been living and working in Sweden for six months on an expatriate contract. Before joining Company Z, Ronaldo had worked at various multinational organizations in Brazil and the United States. More specifically, Ronaldo worked at Company D both in Brazil and the United States, where he was hired on an expatriate contract for 1.5 years and later transferred to a local contract. Ronaldo's narrative was rather unusual since he transferred to a local contract at Company D Mexico. He and his family, however, resided in the United States, in the state of Texas, across the border from Mexico. Ronaldo was of Brazilian nationality, and was in his mid-forties. He has had a 27-year career in human resources in multinational organizations in Brazil, United States, Mexico, and Sweden.

Career transitions. Ronaldo joined his first employer, a U.S. multinational company, in Brazil at 14 years of age. He attended the company's industrial training school. Ronaldo proudly described the humble beginning of his career, as an apprentice toolmaker at the same company where his father (and many members of his family) worked as a metal worker. At 18 years of age, Ronaldo was hired by the company's HR department while he was still in high school. He earned his Bachelor's and later MBA

degrees while working full-time and attending evening school. Throughout his career, Ronaldo had numerous career transitions, at several organizations. Some form of training and mentoring relationships had assisted him with most of his career transitions. At times, Ronaldo operated in an environment of much change, that is exponential growth of companies where he worked. He relied on his extensive network of contacts, through HR websites and pro-bono activities in which he participated, to provide support during those times. This network of contacts, mostly composed of people outside his organization, had been crucial in all his career transitions.

Ronaldo changed jobs a couple of times throughout his career. He actively sought to develop and advance his career, always looking for better professional opportunities. He shared that his ultimate goal was to become as "HR leader in a big firm" (Ronaldo, interview 1, p. 10). Ronaldo left his second employer and joined a much smaller organization, also a U.S. multinational, where he could report directly to the president. This job opportunity led him later to Company D Brazil, a large U.S. organization in automotive industry. His precondition to accept a position with the firm was to have an international experience in a couple of years. The vice president of HR at Company D promised Ronaldo that he would go on an expatriate assignment in two years. At Company D Brazil, Ronaldo had a problematic work experience, for instance, his immediate boss harassed him and provided him with little support. Company D USA, however, supported Ronaldo and offered him various training opportunities, including a $50,000 executive training program in the United States. At his two-year tenure at the

company, Ronaldo was transferred on an expatriate assignment to Michigan, United States, Michigan.

Ronaldo began working at Company D USA in July 2003. His expatriate contract was for an initial period of three years, with possible renewal for up to five years. The transition to work in the United States had many challenges, including learning different labor regulations, operating in an English-speaking environment, dealing with new local culture, and lack of clarity about his specific job duties at Company D USA. Ronaldo relied on the assistance of a mentor –his immediate boss, with whom he developed a close bond. After 1.5 years in the United States, Ronaldo's former boss in Brazil required his transfer back to Company D Brazil. Ronaldo was not keen on returning to work with a boss who had harassed him. His immediate boss proposed as an alternative solution to transfer Ronaldo to another subsidiary of Company D worldwide. Ronaldo transferred to Mexico, and was promoted to the position of vice president of human resources at one of the largest subsidiaries of Company D worldwide. Ronaldo also transferred from expatriate to local contract. As an enticement to the transfer, Company D sponsored Ronaldo's application for the U.S. permanent residency for him and his family. Ronaldo's family was also not keen on moving to Mexico. As a solution, the family resided in the United States (Texas), across the border from Mexico. Company D offered Ronaldo some of the expatriate benefits for additional six months.

The transfer to work in Mexico presented unique challenges to Ronaldo, including culture shock in regards to Mexican corporate culture, the absence of his family for the initial six months, lack of training and mentoring opportunities, and the

absence of a mentor. To assist with the transition, Ronaldo interacted intensely with his co-workers (employees on his team), who served as his informal coaches, and immersed himself in the Mexican culture. Ronaldo remained at Company D Mexico for about one year. He was headhunted and joined a multinational organization in the pharmaceutical industry. He was initially reluctant to leave Company D. However, he received a great job offer, with superior salary compensation. Ronaldo stated that his biggest motivation to take on this new job opportunity was to work in a different industry (pharmaceutical), with great appreciation and investment in human resources. Ronaldo and his family moved to Miami, Florida for the new job. After about 4.5 years, Ronaldo asked for an international relocation experience. He was transferred to Europe (Sweden), on an expatriate contract, to oversee the merging of his new employer and a Swedish company. His new position was vice president of human resource. His job was challenging and yet it offered him a great learning experience.

Social identity. Among the participants, Ronaldo remained the least number of years under expatriate contract, 1.5 years. He described that his social identity did not alter during or after the termination of the contract. He believed that this was due to his short stay on the expatriate contract. Ronaldo appreciated the benefits of the contract but did not alter his lifestyle or identity. In addition, Ronaldo did not interact with other expatriates. There were only about ten expatriate employees throughout his company. He was the only employee in his sector of work –human resources- on an expatriate contract. He and his family made a conscious decision to integrate with the local community; his children attended regular public schools, although Ronaldo's employer

offered to pay the costs of international school tuition. Furthermore, Ronaldo did not seek to participate in expatriate clubs. Rather, he integrated with the local community of Brazilians residing in Michigan, and with his local church community.

Ronaldo's narrative of localization was unique because, in part, of his short-term tenure on both expatriate and local contract at Company D. The whole process of transferring from expatriate to local contract, and then leaving the organization was very fast. Ronaldo localized in January of 2007; the benefits of his expatriate contract lasted until June 2007. He received a job offer to leave Company D in September/October; he started working with another employer in January 2008. Ronaldo recalled that he did not even have time to feel the reduction of income resulting from loss of the benefits of the expatriate contract. This loss was of approximately 60%. Upon joining his new employer, his salary compensation was approximately 100% above his local salary with Company D. This rapid transition did not allow much time for Ronaldo to significantly alter his lifestyle. He reflected that he never did develop an expatriate identity, nor did he live a typical expatriate life. He attempted to integrate with local communities, both in Michigan and in Mexico. In terms of his career, Ronaldo was always active searching for professional opportunities that enable him to learn and grow. He accepted the position in Mexico on a local contract with the expectation of further developing his knowledge and skills. He opted to leave Company D for the same reason, to further develop his knowledge and skills, and to learn about another industry (pharmaceutical).

THEMES AND SUBTHEMES

The analysis of concepts, categories, properties and dimensions, and the emerging core categories (themes and subthemes) from the narrative of participants is presented below. I analyzed the findings from the participants in Sweden and the United States jointly. Given the small number of participants (eight) and companies (four) included in this study, the joint analysis of the findings was fundamental to provide some form of maximum variation, with the objective of understanding the phenomenon of localization as it was experienced by different people, in different companies/industries, and in different stages of employment under expatriate and local contract.

CASE STUDIES ANALYSIS—SWEDEN AND THE UNITED STATES

Five core categories/themes and its subthemes emerged from the data analysis of the participants' stories in Sweden and the United States. They are presented in table 2.

Theme 1: Uncertainty and isolation. Several key elements were recurrent on the participants' narrative of their experiences of localization in Sweden, at one particular employer (Company A), and in the United States, at three different employers (Company B, C, and D). These elements represent differences they observed regarding the specific career transition of transferring from expatriate to local contracts as compared to other previous career transitions they experienced in their professional lives. Among the participants in Sweden, there was greater commonality as they shared the experiences of working for the same employer -Company A Sweden. Among the participants in the United States, there was less commonality, as the participants worked for three different organizations in different industries, namely oilfield services, metal,

and automotive. Yet, all experiences described by the eight participants highlighted a significant level of uncertainty and isolation in regards to how their organizations handled the practice of localization and how the employees perceived and dealt with this career transition in their lives.

Table 2: Summary of Emerging Themes

1. Uncertainty and isolation a. Of policies, processes, and career path after b. Of support group & knowledge re localization c. Of understanding and continuity of HR services
2. Environment a. Company internal environment b. Socio-economic-political situation country/company of origin c. Professional/personal opportunities in place (country & company) of localization
3. Personality characteristics a. Flexibility and resilience b. Self-management
4. Family a. Opportunities b. Support
5. Sense of belonging

Of policies, processes, and career path

Several participants discussed the novelty of the practice of localization in multinational organizations in general and the fact that their organizations, in particular Company A Sweden, at times lacked clear localization policies and processes to guide their transfer from an expatriate to a local contract. Further, the participants also discussed the lack of a career path following the end of their expatriate contracts. In

some cases, the option to stay local, upon termination of the expatriate contracts, happened almost as the default solution to a situation where there was no other viable employment opportunity available to the employee.

Of the four participants in Sweden, three (Olga, Ernesto, Paolo) had gone through localization about the same time. Two participants localized 2.7 years prior to the interviews and one participant localized 2.5 years before. The other participant (George) went through localization only 4 months prior to the interview. All noted, however, that Company A was in the process of redefining its global mobility policy, thus altering both its expatriation and localization policies. Hence the company had great difficulties in providing clear guidelines to the employees going through this career transition. All participants in Sweden were coincidentally at about the same age. Their career spanned about two decades. Two participants (Ernesto and Paolo) had a 25-year long career, one participant (George) had a 21-year long career, and one participant (Olga) had a 19-year long career. All participants had a good number of career transitions in their lives, and very likely had reached a certain level of both professional and personal maturity. They were in a good position in terms of their age and professional experience to judge the particular experience of localization against the backdrop of their previous career transitions.

Almost in unison, the four participants in Sweden described that the transfer from the expatriate to a local contract had been plagued by more uncertainties as compared to their previous career transitions. Lack of a career path, policies, and processes regarding expatriation and localization created an environment of endless discussions, much stress,

and lack of definite rules to guide both the company and the employees during this career transition. One participant (Olga) recalled that the uncertainties had begun upon her move to Sweden on the expatriate contract. Other participant (Ernesto) recalled that the offer to the expatriate contract had been incomplete (mostly verbal) and that he insisted that the contract be clarified. Yet another participant (Paolo) recalled that processes were not clear regarding his basic working conditions in Sweden, referring to permission to access the IT system, local benefits, and regarding the payment of his expatriate benefits. The other participant (George) was offered the expatriate contract as an enticement to join Company A. His contract negotiation was particularly long and plagued with many uncertainties. Upon joining the firm, he accumulated two functions, which was both stressful and confusing.

> The company was already undergoing the change in terms of the conditions of policies for expatriate contracts. And we were one of the first groups to have this condition. I am saying that because it was so many things that were not established accounting-wise, for example, there were really months and months to establish the systems, the processes of how it should work. It was many arguments. {*Interviewer: So lots of uncertainties during this time*?} Because it was a new thing for the company; the company wanted to save costs, you know. (Olga, interview 1, p. 6).

> I needed to know about the school. They said, no problem the school is already fixed. And the house, they said no problem we will find something for you. And what about the contract? They said, no problem we will fix something

for you. I said, “No way! Before anything I need to have something written!” [*strong emphasis*] (Ernesto, interview 1, p. 10)

Not everything was clear in the process. For instance, I struggled a lot with the IT tools because by being in this contract I was not employed in Sweden but I was living in Sweden; I was paid by Italy but living in Sweden {*Interviewer: So you position in Italy remained? You were paid by Italy?*} I was paid from Italy and that was quite good because the Euro was strong at that time. And, for instance, I was not able to manage anything; I was supposed to have a Swedish account in the IT system…this is interesting to understand the difficulties I had…therefore I got a few months where I was stuck, in my private life because I did not have this personal number, that took a couple of months to get it. And in the office because I did not have a Swedish account. (Paolo, interview 1, p. 7)

The answer to my doubts and question was not immediate; so it took some time getting an answer from them as well. For instance, it was not clear how my benefits would be paid. In the beginning it was found on a receipt, then it became paid in the salary level. I found them paying on my salary, and then it became a different system later on (…) It was a little bit crazy system, and it went on for a while and it changed again. And it became a system through a Swiss company that is still on I think to refund all the benefits. (Paolo, interview 1, p. 8)

At the time of localization, however, three participants (Ernesto, Paolo, Olga) described that the policies in place at Company A were more straightforward and allowed for a transition period of the benefits existing during the expatriate contract. George, another participant, had a more challenging experience as he went through localization at the very moment that Company A was redefining its global mobility policy. In terms of processes, three participants (Ernesto, Paolo, Olga) had a relatively satisfactory experience while George struggled more because of the circumstances aforementioned.

All participants in Sweden, however, struggled greatly with the uncertainties regarding a career path to follow at the termination of the international assignment. All participants described that Company A had never presented the option of localization as a potential route to the conclusion of the expatriate assignment. Three participants (Ernesto, Paolo, Olga) described that their localization had been employee-initiated; only one participant clearly indicated that his localization was company-initiated. However, when participants further described their trajectory towards localization, it was clear that none of them had actively pursued their localization. Rather, they accepted this option due to the nonexistence of any other viable employment opportunity either at their home organization or at another global location of Company A. Below I describe their views of the policies, processes, and career path at localization.

Ernesto, an expatriate employee (manager) for 4.5 years, described that one year prior to the termination of his expatriate contract, his boss and the HR department informed him that the contract was about to expire and it was time to start discussing his

next career move. Ernesto had been given a six-month extension to his two times two-year expatriate contract to figure out his next career move. The search for his next job position was done together with his manager and the HR department. Three positions were located (in Mexico, Italy, India). Ernesto interviewed for these positions and did all necessary research to evaluate if it was feasible for his family to move to these locations. He ultimately decided to remain in Sweden on a local contract. Ernesto and his family concluded that all three positions were not an ideal fit, taken into consideration both his professional and personal needs. At that point, the process to a local contract lasted only one month. Ernesto described it as a "very transparent process with very clear rules" (Ernesto, interview 2, p. 4). Company A presented the offer, and Ernesto accepted it without negotiation. The company offered him a one-year gliding path to offset the loss of the perks of the expatriate contract. As part of the transfer to the local contract, Ernesto received assistance (from an outsourced service provider) helping him figure out health insurance, retirement benefits, and taxation in Sweden.

Although presenting the transition to the local contract as non-problematic, and decided upon partly because of his family needs (i.e. school for the children), Ernesto noted that the position he was offered in Mexico was not ideal. The job position was not at the same location where he had been previously employed, and was not a perfect fit for his professional growth after the expatriation. He later discussed that this type of situation was recurrent at Company A, where employees did not find an appropriate career path to follow at the termination of their expatriate contracts. Ernesto noted that his expatriate contract had guidelines that assured that it was the responsibility of the

home country organization to bring him back and offer a similar position. He also noted however that Company A did not provide firm guidelines regarding a career path post-expatriation. All offers regarding future job positions and a career path were mostly verbal. Ernesto noted that many employees had a similar fate of not finding desirable positions at their home organizations upon the termination of the expatriate assignment.

> Yes, in Mexico there was only one position that they offered. But I did not like it at all. I said, "I am sorry –just keep looking". Then I started closing the door… {*Interviewer: So it was a family decision at some point but also the fact that in Mexico there was not an attractive position...}* It was more like a family decision. Because they said it is going back to Mexico City, not in Queretaro…{*Interviewer: So the position was not in Queretaro*} Yes, we did not like that! Sorry –that's it! Professionally [*the position*] was not bad. It was not the best! But it was not bad…but we decided not to go back to Mexico City. (Ernesto, interview two, p. 5)

> And normally this has happened a lot at Company A. That they do not give you what they promised you after you return [*to your home country*]. {*Interviewer: But is the promise a written or verbal promise?*} In general, most of the time, it is verbal. This is typical at Company A. You will never ever promise something, only you have the security that you have it. And you will not sign it as a manager; HR will sign it as a manager. That's it! You cannot promise anything on the career of a person –nothing! And that is a standard written rule! [*Strong emphasis*] That's standard –I cannot promise anything, but I will see. I

> cannot promise anything but let's look at that! They say, "I cannot promise that this will happen but I will do my best when you come back that you will reach that x level". (…) And I have had examples from Mexicans, Vietnamese, Philipino, and Chinese… The thing that the host company will bring you in is a fallacious type of thing. It is not happening period! Only a few cases are successful. I know of one or two cases. But I think that the majority, let's say, is not rewarded with what was promised to them at the beginning of the transfer. {*Interviewer: So do people expect to receive a promotion*?} At least! At least! At least! [*Repeated 3 times with strong emphasis*] And sometimes you are not returned not even to your old position! And the point is clear, how come that you spent two or three years in the headquarters of the company, and you go back to your tiny little square in the world and there you are valued exactly the same thing? Why did the heck did the guy go to this place? Why?? To me, it does not make sense that x country will send someone to go international –for what? To get an experience… for what? To make this bloody country better, to learn from others, to learn new techniques…and you bring them to a position that their influence will be tiny? [*Strong emphasis*] (Ernesto, interview two, p. 15-16).

Paolo, an expatriate employee (manager) for three years, described that about six months before the termination of his two-year plus one year extension expatriate contract he started looking on his own for his next job position. He was unsure if returning to Italy was a feasible option since another employee had been permanently hired into his previous job position. Hence Paolo initiated a conversation with his

manager regarding his future career plans, and discussed his intention to move to another part of the organization. This conversation did not involve the company's HR department. On his own, Paolo started searching locally and globally for job positions. He tapped into his network of colleagues in the firm and also followed the company's website in search of his next job. He found two job possibilities, one in Nigeria and one in Sweden. The position in Sweden was housed in another part of the organization (Research & Development), at the same physical location where he was working on an expatriate contract. He described that one of the reasons that he remained local was the inexistence of a visible job opportunity in his home organization in Italy.

Paolo's process of transferring to local contract started about three months prior to the termination of expatriate contract. Paolo noted that Company A had clear policies to guide the process of moving employees from expatriates to local contracts. It was a straightforward transition in terms of the practical aspects of the transfer. Paolo was offered a transition period where the expatriate benefits declined over time. On the other hand, Paolo discussed that Company A did not provide firm guidelines regarding his career path after expatriation. Paolo had perceived his expatriation as a promotion and a possible unwritten promise of more challenging career opportunities. However, close to the end of his expatriate contract, there was no clear career path available to him. The transfer to a local contract, although initially described as being employee-initiated, is thus resulting from a situation where Paolo lacked a better employment opportunity, taken into consideration both his professional and personal life.

After that, there were no plans; I had to find out the plans by myself. In my story at Company A this has been the most unpleasant thing…the fact that there were no plans at all; this attitude of do that one be happy for those three years, and we will see. And that defined a little bit my transition to a local employment in a way because when I got let's say six months before the end of the third year, I started looking around okay, if I go back to Italy I have to…the contract was okay you can go back to Italy in a similar position to the one that you had before. Yes, this is why I say similar because the position was taken by another person. They could not guarantee me. They cannot throw out the other person for me because he was permanently employed in that position. Similar position can mean anything. And I decided that maybe before going back I needed to look also here to see if there is anything interesting. (Paolo, interview 1, p. 10-11).

Yes, there were no other interesting positions. Honestly to me the priority was not to stay in Sweden I don't know if I said it the last time. The priority was to find something interesting from the work perspective, let's say. And also something that was feasible for my family because since we started moving almost five years ago they are in a way dependent on me (…). So the choice of localizing in Sweden was mainly due to the missing opportunity in Italy; and it was a mix because of the missing opportunity but also the wish of not staying more in the same organization (Paolo, interview 2, p. 1).

Olga, an expatriate employee (director) for 2.5 years, described that about five months prior to the termination of her two-year plus six months extension expatriate contract, she started discussing with her boss the possibility of remaining in her position on a local contract. Olga had been transferred to Sweden from Company A's subsidiary in the United States because of closing of the facility. Her expatriate contract was supposed to last two years; the six-month extension had been granted because of management changes happening in the organization that did not allow a better evaluation of her work. Olga described that it was not clear that her newly hired boss was pleased with her work and had any intention to continue her beyond the six-month extension. At the five-month mark, he offered Olga to remain in her position on a local contract. Olga had also looked into another local position at a second U.S. subsidiary but ultimately decided not to pursue it for family reasons. Her husband was also employed at Company A Sweden and wanted to remain in the organization, particularly considering his aging relatives living in Russia. Olga described that her localization happened because her husband decided that the family should remain in Sweden. Olga's functional boss and the HR department handled further details of the process of localization. Olga received a lump sum payment to offset the loss of the perks of the expatriate contract. There was some additional negotiation about other benefits, such as tax return, home trips. There was no discussion however regarding a career plan for Olga. The process to localization entailed mostly practical matters related to the transfer from the expatriate to the local contract. This process did not aim at assisting Olga with her permanent transfer to the

Swedish subsidiary and to life in Sweden. In terms of her future career plans, Olga did see herself remaining forever in the Swedish subsidiary.

> If you ask me how I would rate this process, the localization process, I think it was like no process! [*Strong emphasis*] It was decided okay, what is my salary and then it was some negotiation around the salary, around some benefits, home trips and stuff. It was only money, money negotiation process, not social. (Olga, interview two, p. 6).

> {*Interviewer: So you became local, so now you are permanent in the subsidiary. Do you feel that this is permanent to you?*} Yes, I understand it. I don't! I don't! I don't! But I have small children and so on…it's a short term or middle term solution [*chuckles*] I don't know how many years this middle term solution will last, depends on the family. But I don't see this as permanent. I don't want to think as this as permanent. I just don't belong here. I don't belong in here [*thoughtful consideration*] (Olga, interview two, p. 10).

George, an expatriate employee (director) for five years, is the only participant among the participants in Sweden to describe that his localization was company-initiated. Company A Sweden had hired George on a full-fledge expatriate contract, with more extensive benefits, as an enticement for George to join the organization. During his expatriate tenure, George received two job promotions and was identified as a "high potential" employee, recognized thus as a candidate for more challenging professional opportunities. He had had discussions with his bosses of moving to another side of business as a way of preparing him for future professional opportunities. George had

limited choices of locations worldwide where he and his family would agree to move. There was never any discussion of George staying in Sweden on a local contract; the major concern being the financial loss that this would represent. Further, people in the organization, for instance George's former boss, had presented this option as a negative career move as it entailed a reduced salary and higher taxes. Internal discussions regarding his localization started as a result of a sudden vacuum of knowledge and competencies in his sector of the organization because of change of crucial personnel. Since Company A was in the process of redefining its global mobility policy, lots of uncertainties and a very long and tortuous negotiation process marked George's transition to the local contract. This process involved his boss and the HR departments in Sweden and Switzerland (the corporate headquarters of the company).

> I have never been seeing this as an option. The whole of that two-year period that we are always talking about me going to find another location to work where I could get an expat salary or at least something… I would get some experience, and we would face that issue regarding salary when we came back. Maybe I'd come back at a higher position anyway that was at least partially compensate… I don't know. But that was the game plan. There was never any discussion whatsoever for the whole of the five years until the last few months about localizing [*Strong emphasis*]. Simply on the basis that it would not make sense financially, and with the higher taxes and lower salary you will not find it attractive. (George, interview 1, p. 15).

> It took me 5 to 6 months of the painful process mainly because of the uncertainty going on in the background of the changes of the conditions. No one felt they were on the solid condition to commit to anything. They always needed to check with ten people and those ten people did not know, and they would to check with other ten people…it was ridiculous! So they couldn't agree to anything. But the package more or less stayed the same from start to finish. There were a few mistakes that they made but that they compensated for in different ways. So it was a bit clumsy this whole approach but the main issue was that it just hit at the time that they were changing the deal. And everyone lost confidence on what I could offer or what I could not offer. And whatever they offered turn out to be not quite true a month later and that was highly frustrating trying to make progress and nail it down and then suddenly opens back up again because they find out, "Oh, I should never have offered this to you". So it was very messy and very disappointing but I think it was circumstantial because of that change. (George, interview 1, p. 18).

Ultimately, George received a very generous gliding path to the local contract, with declining benefits extended over a four-year period and with minimum losses in the first two years. His understanding was that Company A offered him this extensive gliding path with the twofold purpose, a) retaining the competencies needed at that crucial time; and b) buying time towards finding George another job position in the organization. Hence he understood that the company granted him de facto almost an extension of the expatriate contract. Much of the discussion regarding a career path for

George involved his professional network of key people in the organization, and not necessarily established processes and a clearly defined career plan. George described Company A as very much "a relationship-based organization" (George, interview 2, p. 10). He also understood this to be a fragile situation as people often move on to other jobs, which may impact their input on helping George and other employees secure a future job promotion and a clearly defined career path.

> The equivalent weakness is the original party of people who was interested in bringing me in the first place have moved on. So Patrick does not work for the company anymore; Harry is now in Texas and not influential really for me anymore; it can be leveraged if it need to be but he is not day-to-day involved. And Gustav is in a very different job, with a whole set of different priorities. He is not formally my mentor and I hardly ever see him. I have an Italian manager now who seems to think that I'm okay but it is not the same thing at all [*emphasis*]. So it is a fragile thing with a relationship-based because those people move on into different fields or you do; and there for that constellation is gone. (…).So it kinds of bounces but that's my case I don't know if it feels the same for other people [*thoughtful consideration in lower tone of voice]*. But to me that's very fragile in the relationship side; if those people disappear or you move jobs and you lose, you get more distance and the support base you have sort of disappears (George, interview 2, p. 11).

Among the participants in the United States, some degree of uncertainty was also described, both in terms of their time during the expatriate contract and the transfer to

the local contract. Two participants –Gustavo and Rosa- employed at the same organization (Company B USA) reported many uncertainties since their entry to the expatriate contract. Both participants had been initially recruited/hired by Company B Brazil, which at the time was still in the process of being formed. Gustavo was immediately transferred to Company B USA for training and he expected to remain in the United States for a couple of months. His employment contract was very unusual. Gustavo was an employee of Company B Brazil, with whom he had signed paycheck stubs for the upcoming two years. This was an illegal practice utilized by Company B in lieu of a contract of employment. Gustavo was on loan at Company B USA; he was hired on some form of expatriate contract. As the establishment of Company B Brazil did not happen, Gustavo remained in the United States for a longer period than expected. After about one year, he was hired by Company B USA on a local contract. He noted that the company did not provide much support in terms of preparation for the international transfer, and later for the transfer from expatriate/temporary to local contract. Both transitions took place amid an environment that resembled "the wild, wild west, very adventurous, with employees expecting some type of support that did not often happen" (Gustavo, interview 1, p. 10). In addition, Gustavo initially did not understand the different types of contracts existing within the organization. An explanation of the different contracts of employment was never provided by Company B USA. Gustavo learned these differences on his own much later, after transferring a couple of times between different contracts. Gustavo had three subsequent experiences of expatriation with Company B (Brazil, Mexico, and Angola). Some level of

uncertainty had also plagued all experiences of expatriation. In Brazil, he was initially granted extensive expatriate benefits, which were later withdrawn because of his Brazilian nationality. In Mexico, he expected to receive a job promotion upon transferring but was granted only a 40% compensation supplement for residing at that location. In Angola, there were many difficulties related to bureaucratic matters regarding legal authorization to work in the country. There was not much assistance from the company; there was an assumption that Gustavo could handle the situation because of his ability to speak Portuguese. He noted that other colleagues received more support from Company B. Gustavo transferred between expatriate and local contracts a couple of times at Company B USA. In total, he had four experiences of localizing or returning from expatriation to Company B headquarters in the United States. In most cases, some degree of uncertainty was present. Upon returning from expatriation in Brazil, Gustavo was hired on a grade level below his previous position. Company B USA had done so in an attempt to save Gustavo's job. Company B Brazil had contemplated terminating Gustavo; at Company B USA a major layoff was taking place across the organization. For months, Gustavo was unsure about his employment future. During his time of expatriation in Mexico, Ronaldo described that he had planned to secure a contract at another overseas location. His return to the United States was unexpected. He did not want to repatriate and localize; his career goal at the time was to transfer to Asia. He was however recruited back to the United States to take over a position that had become vacant. During his time of expatriation in Angola, Gustavo and his family struggled to adapt to the country. His wife and child returned to the United

States one year prior to the termination of Gustavo's expatriate contract. Gustavo again aimed at transferring to another global location of Company B but was recruited to fill a vacant position at the company's headquarters in Houston, TX.

Gustavo noted that although Company B advertised that it empowered employees to build and drive their own careers. In his experience, he was unable to drive his career the way he wished. His tenure under both expatriate and local contracts had existed exclusively to serve the needs of the organization. All of his experiences of localization were company-initiated. Some of those experiences were against his will, especially after the termination of his expatriate contracts in Mexico and Angola. In his words,

> I don't think they handled [my localization] the way I wanted it to happen. The company advertises that we can drive our careers the way we wish. They talk openly about this; it's part of the company's policy. They say they want you to be where you believe you will be happier, where you would perform better. But, in reality, the need of the subsidiary or person that is recruiting you bypasses this. Sometimes you move on to jobs that were not necessarily of your choice. The company's need has priority (Gustavo, interview 1, p. 22).
>
> Eu acho que não foi gerenciado de acordo com que eu gostaria de ter feito, que é normalmente o que a companhia faz muita propaganda que você coloca a carreira de acordo com o que você quer fazer para seguir sua própria carreira {entrevistadora: isso aí é explicitado pela companhia} é explicitado, faz parte da política da companhia, eles querem que você esteja no lugar onde você

> vai estar mais feliz porque você vai contribuir mais. Mas, na verdade, a necessidade, de alguém que te queira porque precisa de você, mas não é necessariamente o trabalho que você quer, é quem vai te pegar. Isso tem uma prioridade (Gustavo, interview 1, p. 22).

Rosa also experienced many uncertainties at Company B, both under expatriate and local contracts. Rosa was initially hired by the newly opened subsidiary of Company B in Brazil. Shortly after she transferred to Argentina on an expatriate contract. Rosa understood that she would remain in Argentina for a couple of months, engaging in various projects with the purpose of training, until Company B Brazil became more established. Rosa was hired on the most flexible expatriate contract available at Company B, which entailed the commitment of the employee to frequent transfer to global locations of the company –this contract also entailed a very generous benefit package. The transition to work in Argentina was plagued by uncertainties because of the financial situation of the local company. After one year, Rosa was transferred to Company B headquarters in Houston, TX. She continued on the same expatriate contract for the initial six months. She was later transferred to a more modest expatriate package, which she kept for five years. The transition to work in the United States had been satisfactory. Rosa received plentiful training and the constant support from her mentors.

At the end of her five-year expatriate contract, Rosa was transferred to a local contract with Company B USA. She described this transfer as company-initiated. During her expatriate-contract tenure, Rosa tried to find another expatriate contract at a global location of Company B. However, she was unsuccessful to find a job position for both

herself and her husband. She was offered an expatriate position in Brazil but had to turn it down because of lack of a job position for her husband. She did not seek her localization, nor she was content with the transfer to a local contract.

Company B did not provide any form of gliding path to localization. Rosa lost all benefits of the expatriate contract as soon as she transferred to a local status. She kept the same job position, with no promotion or salary raise. She noticed that finances became tight; she resented the fact that she did not receive a salary raise to compensate for the loss of the expatriate benefits. In addition, there were many uncertainties related to Rosa's future career at Company B USA. Up to that point, she had anticipated having a global career, constantly transferring to various global locations of Company B on expatriate contracts. Given the various circumstances, including reduced salary compensation after localization and unclear career prospective at Company B, among others, Rosa decided to leave the company. One and a half year after her transfer to a local contract, Rosa took another job with a direct competitor of Company B USA, in the city of Houston, Texas.

Another two participants (Ronaldo and Pedro) in the United States, employed at different organizations, offered similar narratives of uncertainties in regards to either their time on the expatriate or local contract. Ronaldo, a participant employed at Company D USA, was hired on an expatriate contract to the United States for an initial period of three years, with the possibility of renewal for up to five years. The initial transition to work in the United States was somewhat stressful because of new labor regulations, difficulties with the English language, lack of clarity in regards of his job

duties, etc. Ronaldo, however, relied on the assistance of consultants and a mentor, with whom he established a very positive work relationship. Ronaldo's transition to a local contract was abrupt. He had been in the United States only for 1.5 years, and expected to remain longer on an expatriate contract. Company D transferred Ronaldo to a local contract as a strategy to avoid repatriating him back to his home organization in Brazil. Despite the reduced salary compensation, Ronaldo understood this to be a good career move as he was promoted to a more challenging leadership position. During his time of employment in Mexico, Ronaldo dealt with various uncertainties and stresses, both in his professional and personal life. His new job was very demanding and had numerous challenges, including working in a rather different corporate culture. He lacked both training and mentoring relationships upon transferring to Mexico. Ronaldo's family took approximately six months to join him in Mexico, and later resided across the border in the United States. Before the end of his first year of employment on a local contract, Ronaldo left Company D for a better employment opportunity.

Another participant, Pedro, had a similar experience with uncertainties during his international work experience. In Pedro's case, these uncertainties were mostly associated with his unexpected long tenure on an expatriate contract. Pedro transferred to the United States for an initial period of three years but ended up remaining on an expatriate contract for nine years. During this time, Pedro was employed in two facilities of Company C USA –in the states of Texas and Michigan. After approximately six years in the United States, Company C sponsored the application for permanent residency for Pedro and his family. Pedro maintained his expatriate contract even after becoming a

permanent resident status in the United States. As a professional of HR, Pedro was aware of his irregular situation. In numerous occasions he discussed the propriety of this situation with his bosses. Company C, however, decided to extent Pedro's expatriate contract in an attempt to retain his talent. Pedro was responsible for an important labor negotiation at a time that Company C was closing down one of its facilities.

In conclusion, some level of uncertainty has plagued most experiences of expatriation and localization in the narrative of participants. In some cases, these uncertainties had been more acute, with employees operating in an environment characterized by chaos, intense stress, and lack of clear guidelines. According to the participants, this was a stark contrast to their previous career transitions.

Of support group & knowledge regarding localization

All participants discussed the absence of a support group or prior repertoire of knowledge regarding localization. All participants narrated their experience of going through this career transition without much support of other colleagues, or without any knowledge of a common repertoire of information, such as knowledge about colleagues' prior experience, didactical material, in regards to transferring from expatriate to local contract. The novelty of the practice of localization in global organizations is in part responsible for this particular characteristic of localization, with employees navigating this career transition with more uncertainties and more isolation as compared to their previous career transitions.

Among the participants in Sweden, two participants (Paolo and George) knew of other colleagues going through the transfer to a local contract. The other participants

(Olga and Ernesto) went through their career transition without knowing of other colleagues going through the same process, or without exchanging notes with anyone else about their experiences. Hence, the support group was somewhat inexistent for these participants. In their opinion, only few employees ever accepted the offer to transfer from expatriate to local contracts in Sweden. Most people often returned to their home organizations in any job position they were able to secure or chose to leave the organization.

Paolo stated that his contact with other employees going through localization served more as an opportunity to vent their frustrations rather than to exchange notes on how to navigate this career transition. He noted that people from different national backgrounds have different outlooks and needs. Therefore, the support group existing at the time of localization operated in a different manner, serving more as a buffer from total isolation rather than an actual assistance to navigate the novelties of this particular career transition. Paolo shared the following sentiments.

> Yes, there has been some people; more than exchanging instructions it was exchanging frustrations when things were not working [*chuckles*] Yes, there were a couple of other families that were more or less in the same transition from Turkey and Hungary here. But still you might have a different need and different perception of things, depending also of your country of origin you might have an expectation on something and not on something else; it's not the same…I think it's important [*to know other people going through localization*]. Sometimes if you're not able to manage something, if you see it's only you, you feel a little bit

> stupid. But if you see it is a common problem, if you see it's other people then okay at least we are stupid together! [*laughs*]. I think it was nice to have other people at least (Paolo, interview two, p. 15-16).

George described a similar situation regarding the assistance of a support group. In his small network of colleagues, George knew of three employees who had been offered the possibility of transferring from an expatriate to a local contract. This knowledge, however, was not always clear. For instance, he did not know that one of his colleagues was on an expatriate contract until he discovered that he had also transferred to a local contract. George did not exchange information or discussed the hassles of transitioning from expatriate to local contract with any of his colleagues. In George's narrative, he noted that he never did feel felt supported during his transition to localization. Rather, one of his colleagues (who was also his former boss) had presented the possibility of localization in very negative terms in terms of its financial consequences. This employee had refused the offer to localize and had since managed to secure another expatriate contract overseas. George's negotiation about a local contract was done independently, without anyone serving either as a mentor or even a sounding board. This was a stark contrast from his experience as an expatriate when he was surrounded by a group of mentors who guided him during the negotiation process to join the company, and then later assisted him during the initial months of work. George eventually managed to secure a good contractual deal of localization. He later found out that another colleague who had also gone through localization at the same time did not have the same luck.

Two other participants in Sweden (Ernesto and Olga) reported that they had gone through the transfer to a local contract alone, without knowing anyone else going through it at the same time. Ernesto noted that he was the first of his generation of expatriate employees to transfer to a local contract in Sweden. The majority of his colleagues had moved back to their home organizations, moved to another assignment overseas, or left the organization. Olga described that she did not know many other expatriates throughout the organization. In her section of the company (accounting), she did not know any other employee on an expatriate contract or any other employee who had transferred from expatriate to local contract. Hence the experience of localization for both Ernesto and Olga had been a solitary transition, without the support or even the awareness of other colleagues that they had gone through this career transition. Both participants discussed that their transition took place with much consultation with their families, who in fact served both as their support and resource group.

Interestingly, all participants in Sweden with the exception of George did go through the transfer to a local contract at about the same time (either at 2.5 or at 2.7 years prior to the date of the interviews). Apparently they did not know one another nor did they exchange information in regards to this career transition. Company A Sweden was a large plant with approximately 3,500 employees. It is thus not surprising that employees who do not work together, nor are linked to any particular network know one another. The fact that expatriates at Company A Sweden were not organized in any particular network was both positive and negative. On the positive side, there was not much status difference between employees on different types of contract. On the

negative side, this lack of visibility and knowledge about the expatriate employees did not allow people to serve as a resource and support group when needed.

Ernesto shared that since his transfer to a local contract, he became a reference to other colleagues going through localization. He believed that his mentorship had been helpful to others, and the he wished he could have had the same opportunity when he went through the transition from being expatriate to local employee. When Ernesto arrived in Sweden as an expatriate, he had the support and assistance of his immediate boss who served as his mentor. This assistance was very valuable to transition to his life in Sweden. Ernesto's boss had also been an expatriate and knew some of the difficulties experienced by newly arrived employees and their families. In addition to his boss's assistance, Ernesto also relied on the assistance of other expatriates whom he met at the local international school or the local international club. The experience of moving to become an expatriate had not been a solitary experience but rather a very apparent transition in the eyes of some of his colleagues and part of the local community. This assistance certainly helped to ease some of the difficulties of the transition to becoming an expatriate in Sweden. At the time of localization, however, the transition had been solitary, with Ernesto not being able to rely on the assistance of any of his colleagues.

Among the participants in the United States, Gustavo and Rosa, both employed at Company B USA, described a similar situation. Gustavo, in particular, noticed that all his experiences of localization had been marked by more isolation as compared to his previous experiences of expatriation. As Gustavo transferred a couple of times between contracts at Company B USA, he had more opportunities to evaluate the difference

between expatriate and local transfers. In his experience, once an expatriate employee arrived at an international location, there was an immediate readiness of others to assist the newcomer in the group of work and residence. Expatriates were soon integrated to the community of employees in the same situation. This was resulting, in part, because of the reduced size (as compared to the headquarters) of most overseas offices, as well as the limited diversity of personnel at most subsidiaries of Company B worldwide. It was also resulting from the fact that most expatriates, Gustavo included, lived in residence compounds where only people on expatriate contracts resided. During Gustavo's transfer from expatriate to local contract at Company B headquarters, however, there were no readily available groups of people to assist new employees. Gustavo joined a large group of thousands of employees, some of international origin, who were very accustomed to the frequent transit of personnel in and out of the organization. Gustavo's experiences of localization were marked by more isolation as compared to his experiences of expatriation. No one was aware of the fact that he had transferred from expatriate to local contract; no group was readily available to help with his integration to work groups, and to his new place of residence.

Rosa experienced a similar situation. Upon joining Company B as an expatriate employee, both in Argentina and the United States, she received assistance in the form of training and mentoring relationships. In Argentina, she was part of a new group of employees, some on expatriate contracts, which became her support group during the transition to the new job. In the United States, she had the assistance of a mentor, her immediate boss with whom she established a close relationship. The transfer to the local

contract, however, occurred amid an environment in which she was unaware of other employees going through the same experience; there was no immediate support group, nor any mentoring relationships. Rosa noted that she was somewhat satisfied that other employees were unaware of her transfer to a local contract. Given her belief that at Company B expatriates were in a better position to secure future job promotions, she understood that a quiet and invisible transfer from expatriate to local contract allowed her to remain competitive for career advancement opportunities at the organization.

Two other participants (Pedro and Ronaldo) experienced the transfer to a local contract upon changing jobs and moving to another location of their companies. Becoming a localized employee at a different location of the firm had its own advantages and challenges. Pedro and Ronaldo presented rather different narratives. As a new employee at a different location of the organization, Pedro received some form of job transition assistance. After nine years on an expatriate contract, Pedro noted that he did not need much support either from colleagues and/or a mentor upon the transfer to the local contract. Ronaldo, on the other hand, had a more traumatic transfer to the local contract at a different location of his firm. Ronaldo had held an expatriate contract for only 1.5 years before transferring to a local contract. Upon his transfer, he joined a facility of his organization at a different international location –Mexico. There were many challenges associated with his new job, such as a demanding job, the absence of his family, and a strikingly different business culture in Mexico. Ronaldo received almost no training upon joining the Mexican firm. To make matters worse, there were no other expatriate or former expatriate employees at the firm. Ronaldo noted that the most

challenging aspect of the transfer was the lack of any type of support system. For the first six months, his family was not with him. At work, he missed the close interaction with his mentor –his former boss at his previous location of work.

> Besides becoming a local employee, and changing job locations and countries, I dealt with the family issue, which was very important. I also missed the support I had in Detroit. I was close to my mentor, he was the person who brought me to the United States; he believed in me, he mentored me. I did not work directly with him but I used to see him every day, we talked on a daily basis. In Mexico, I was alone! (Ronaldo, interview 2, p. 11).

In addition to the lack of a support group, there is a dearth of knowledge and resources available about localization, particularly because of the novelty of this type of employment. In contrast, there is ample information available regarding expatriation and even repatriation. Thus, it is relatively easy for expatriates to look up on their own for websites, publications, and other resources about moving overseas as an expatriate or even returning to their home countries at the end of the international assignment. In a simple search online, it is relatively easy to locate groups where expatriates mingle together in most countries, making it possible for expatriates to establish a social community of support right from the beginning of the move overseas. In addition, the online venue allows for off-site network of support through blogs and social network pages, containing various types of information regarding the difficulties of the move overseas. However, very little or no information is yet available about what is required to move from an expatriate to local contract at an overseas location. As a result, the

transition to localization often occurs in an environment where a local support network and a common repertoire of knowledge are unavailable. This is rather different from other types of transition previously experienced by the participants, including expatriation.

Of understanding & continuity of HR services

Six participants (Ernesto, Olga, Paolo, George, Gustavo, and Rosa) discussed the lack of familiarity of HR with issues faced by employees when moving abroad on an international contract. They attributed this to the fact that most HR employees had experienced working abroad. Hence they were largely unfamiliar with issues faced by expatriates/localized expatriates and their families. In addition, the participants also discussed that upon moving to a local contract, there was an immediate halt of contact with the section of HR (global mobility team) that worked with them for years. The participants in Sweden, in particular, described that once localized they were automatically transferred to the local HR department of the company This group of employees were even more unfamiliar with issues faced by international employees.

According to most participants, the majority of HR personnel were unfamiliar with issues facing expatriates, including global mobility teams or HR employees in charge of direct handling of international contracts. According to one participant (Ernesto), the lack of experience of living and working abroad was the reason for such lack of comprehension of the difficulties and hurdles faced by expatriates and their families.

> There is a group in HR that is in charge of the international contracts but that does not mean that they have an international experience. There are issues that you as an expatriate have difficulties with that do not make much sense to them. And that's basically because they never lived abroad as an expatriate. Their job is to do more administration, support, and things related to the moving, and complaints about the relocation company (Ernesto, interview 2, p. 14).

In addition, all participants in Sweden and some in the United States complained about their companies' strong reliance on the services of relocation agencies –in general, an outsourced service provider contracted by companies to assist with various issues pertaining to the relocation of expatriates. Among the participants in Sweden, they blamed the relationship of Company A and a particular ineffective relocation agency for the lack of HR's understanding of issues faced by expatriate employees. Several participants described incidents that clearly exposed the poor handling and miscommunication between HR and the contracted relocation services, which created more problems rather than solutions for expatriate employees. For example, upon the transfer of employees from expatriate to local contracts, the services provided by the relocation agency were immediately terminated, and consequently all assistance provided was also discontinued. For one participant George, this was a big problem because his home rental contract was cancelled without his knowledge and approval.

> And then about a week later I received an email from the relocation agency saying we have cancelled your contract so please advise when you would like to move out. So they went ahead and cancel it directly with my landlord

> before discussing it with me. And that left me in a very difficult situation. They basically said Company A does not pay us anymore. So basically you have nothing to do with us anymore. You have to create a new arrangement with your landlord or move out but your contract is now canceled. You have three months notice. So I was furious with HR. I said how can you do that, you know. It's a localization allowance and you have not discussed anything with me. And it's certainly put me in a bad situation; potentially you put me on the street because it is very difficult to get accommodation in Sweden (George, interview 2, p. 13).

Both participants in Sweden and the United States described that, at the time of localization, employees were almost immediately transferred to another sector of HR services within their companies. Localized employees were immediately transferred from the global mobility section of HR to local HR departments. At Company A Sweden, employees were at that point invited to attend new employee training sessions, geared to any new hire of the month/period and not necessarily to people who transferred from expatriate to local contract. Olga indicated that she was invited to attend such session but never did find time to do so. She noted, however, that given the uniqueness of her situation (moving from expatriate to local contract), she would not have felt comfortable to ask questions to address her specific needs.

> Yes, they took a set of people that were hired in the month of June and they put them in this two-hour session and they explained okay, "You are a new at Company A, this is what you should know". It was not related to localization at all. It was a new employee training session, which I never took because I could

never accommodate. It never worked with my schedule. {*Interviewer: Okay, all right but they do have a training session once you localize. And I guess you know that you could possibly have asked questions during the session as they related to your needs as a recent localized employee*} I don't think I would do this because you know it is not a good thing to kind of stick out in that crowd, usually when you are sitting with normal people [*participant clears her throat*] you don't ask question of that nature. I would ensure you. {*Interviewer: Yeah, probably because it would be more of a Swedish crowd, isn't it?}* Of course, it would be. No, not any people in my shoes [*chuckles*] (Olga, interview two, p. 6).

In addition to dealing with another sector of the HR service, localized employees were also immediately removed from the information network (mailing list) available to expatriates. Participants both in Sweden and the United States stated that their companies used this mailing list as their main platform to communicate issues pertaining to rules and regulations of the host country, and general information necessary to expatriates. These mailing lists alerted about various issues, from routine to important information, such as the need to winterize your car with the approaching of the winter season in Sweden to new labor regulations in Sweden and the United States. Once employees transferred from expatriate to local contracts, they were immediately removed from these lists, and no longer dealt with the global mobility sector of the firm. Hence, they dealt exclusively with the local HR of their companies. According to the participants, the local HR departments were even more unfamiliar with issues faced by international employees. In Sweden, at Company A, the situation was complicated

because most HR services were available through an online platform, written in Swedish and designed for Swedish employees, although the official language of Company A Sweden was English. Hence, both participants in Sweden and the United States confirmed that there was an immediate vacuum of knowledge for localized employees of various issues pertaining to the HR services once they transferred from more sheltering expatriate contracts, with its closer assistance and connection with the global mobility team, to regular local contracts. Among the participants in Sweden, issues related to employee benefits, retirement, and union regulations were still largely unknown, given the fact that most information was only available in Swedish and none of the participants speak Swedish. Among the participants in the United States, these issues were not a problem as they were explained to the participants upon their joining the firm on an expatriate contract.

> You know basically when you finish the assignment you don't…you cannot go to the same people that helped you before for example, there is a mobility specialist at Company A that helps you with little questions here and there. But when you become local you go to general HR service and that's it. You get treated like a normal employee, in a normal queue, nothing is special, I even didn't think that I can ask questions oh, what to do about driver's license (Olga, interview 2, p. 5-6).

> That's an inconvenience to deal with the Swedish side, which is not always in English for example, yes and that's the difference [*emphasis*] yeah, they speak English most of them. It's not staff it is site. Everything you do now

you don’t get a physical person to talk to you, right? You get online and then you pose questions or you research yourself. And then all these employees services sites, local employees Company A sites, they are in Swedish because they are for local employees. And then I have to find out…a better understanding about salary rules…I don’t know… some pension, I still don't understand the pension (Olga, interview 2, p. 3).

{*Interviewer: And during the first months of localization were you still part of this information network?}* Not really, you get out immediately because you lose your international employment assignment and you go to a local list of people; so you change…this is a practical change at Company A but I think that at other companies too…there are…most of the things are communicated by email and these kinds of tools, so either you are part of the distribution list or you are not. And as soon as you move to a local contract, you are taking out of all the lists. {*Interviewer: And is there a third list of people who are transitioning from expatriates to local contracts?}* No, there is not. You suddenly get out of all these networks of things, and unless it is you personally keeping it up or trying to keep it up…it changes your life in a way. You were not reminded for instance, just a stupid thing, you are not reminded that you need to change the tires in your car [chuckles] normally there is an email that comes out telling you to do it by that date, and then you do it…. Now it is up to you to the sign when you need to do it. This is a stupid thing, but just to show you the difference (Paolo, interview 2, p. 5).

Participants in Sweden described that, upon becoming local employees, they dealt with undeclared expectations (both from their firm and their colleagues) that they ought to know various issues pertaining to work life in Sweden since they had been in the country for some time. However, as evident in their narratives, there was no well-coordinated transition to prepare the employees to transfer from expatriate to local contract. Paolo described, the transfer to a local contract felt like the "bubble" in which they live while expatriates suddenly burst, projecting them into real life with limited knowledge of their new surroundings but with an assumption from company/colleagues that localized expatriates were familiar with various aspects of life and work in Sweden.

> When you move to the local contract the company needs to learn how to manage you; (…) not assuming that just because you have been here for some time in an expatriate contract you know everything. Because that is not true! As I said before, you live in a bubble… and then the bubble explodes, and suddenly you are projected into real life. And the company things that you have been here so you should know many things; and that's not true. Including also the union implication here; before I was supported because I was a foreigner, when I was an expatriate, so I was not expected to be aware of the local regulations and whatever. Now it's not accepted that I'm not aware of the local regulation when it comes to unions (Paolo, interview 2, p. 14).

Theme 2: Environment. In the narrative of the participants, it became evident that the environment a) company; b) country of origin of participant; and c) country and region of localization -played an important part in defining the particular aspects of each

story of localization. In this theme, I addressed certain aspects of the environment as it relates to the a) company internal environment (i.e. business culture of companies, type of industry, global mobility policy; b) socio-economic situation home country/home company of origin; and c) professional/personal opportunities in the country of localization.

Company environment internal

Each narrative of localization was significantly impacted by the employment of participants at their particular employers, with their own business cultures, particular characteristics of their industry, and internal HR policies. The participants in Sweden were all employed by Company A, a multinational family-owned company in the food packaging industry. The participants in the United States were employed by three public multinational corporations in different industries –field and oil services, automotive, and metals.

Company A's internal environment, according to most participants, had two main characteristics that strongly impacted their experiences when transferring from expatriate to local contracts. They are a peculiar business culture and a moment of redefinition of its global mobility process.

Most participants described that Company A was a relationship-based organization, which did not rely on well-established HR processes for career management and promotion of employees. Most participants noted that it was necessary to establish strong ties with as many employees as possible across the organization in order to secure future job promotions. They believed this to be both positive and

negative. On the positive side, it gave employees who did manage to establish a solid network of contact more personal leverage as opposed to what they had in large organizations where they were bounded by rigid structures. On the negative side, these networks of contacts were fluid and unstable, given the constant transfer of people to other job positions and other locations. The need to constant reestablish these networks left employees vulnerable and unsure about their progress in the organization.

George described that the relationship-based culture of Company A helped him during his negotiation of his employment contract, both at the time of joining the firm and at the time of transferring to local contract. He was able to use emotional argumentation with his close colleagues as a mechanism of bargaining for better conditions.

> The company is very relationship-based (…) It has been an advantage because you can use emotional argumentation. At my first employer they treat you like a number, you are one of the 330,000 employees, particularly for the lower end I'm sure it's different if you are higher but I was of course at the bottom of the food chain. In my position with my potential here and with a network of more senior people, of course, I can lean on those people. And the same way, they lean on me. It is more whom you know kind of situation. Who to avoid and who you know; it works a lot more like that then it would ever have done at my first employer which is a standardized, regimented, disciplined…yes too disciplined, too structured, inflexible somehow. Company A is the opposite; it is extremely flexible. Very much dependent on who you know and who is your

> friend. And that's the same in every walk of life in Company A, whether you are in the marketing company talking to customers or you are working locally, it is who you know. So you can lay it on thick with those guys…(George, interview 2, p. 10).

Similarly, Paolo discussed that the relationship-based culture of the firm often helped employees become less vulnerable at times of economic downturn and downsizing. In addition, Paolo noted that Company A's business culture was strongly marked by a Swedish component, which valued understated behavior and subtle ways of self-promotion within the work environment. However, Paolo warned that this was not always easy to be de-codified by expatriate/localized employees, unfamiliar and foreigners to Swedish culture.

> {*Interviewer: But as you mentioned, since here things are so low key in promoting yourself - how do you do that?}* Ahhh, it's a strange situation [*pause to pond*er] it is not by showing up as it might be in another country by becoming a kind of showman or showgirl or whatever [*laughs*] in order to be noticed. Here it is a more quiet way but it is the same, it is networking knowing as much people as possible then you become less vulnerable to end up in this kind of situation But also when you localize, when you get to know that there are redundancy of people or whatever, so the only way for trying to avoid this is to know as much people as possible {*Interviewer: And would you say that it is any different here than in all other organizations*?} I would say it is different here from other countries. It is more a Swedish style; you don't need to make too much noise but

you need to know as many people as possible in order to get something. {*Interviewer: It is interesting*} After a while it becomes boring [*chuckles*] (Paolo, Interview 2, p. 16).

In addition to this particular business culture, all participants in Sweden discussed that at the time of their transfer to a local contract Company A was in the process of redefining its global mobility policy, thus altering both its expatriation and localization policy. Company A was revising the criteria of eligibility to international contracts. From that time on, they were to become available only to employees in higher management positions in the organization (vice presidents and above), or when it was a clear business case of demand for a specific talent lacking in a particular global location of the firm. In addition, according to George, Company A was also trying to make localization more appealing to employees. The offer of a transition package of benefits aimed at encouraging employees to remain at the overseas location beyond the termination of the expatriate contract. Hence, the company environment in which the localization of participants took place in Sweden was also strongly influenced by the changing nature of Company A's global mobility policy, as well as a particular corporate culture of the firm.

Of the participants in the United States, Ronaldo's localization experience was greatly impacted by a particular situation existing at his home organization in Brazil. During his years of employment at Company D Brazil, Ronaldo had suffered bullying by his direct boss. After only 1.5 years of expatriation in the United States, Ronaldo's boss in Brazil requested his return to his home organization. Company D USA transferred

Ronaldo from expatriate to local contract in an attempt to avoid his repatriation to Company D Brazil. Hence, Ronaldo's localization was influenced by this internal situation at Company D Brazil, which made it appealing to Ronaldo to transfer to a local contract at Company D USA/ Mexico.

The socio-economic situation country/company of origin

Through my personal observations and field notes, I noticed that the experience of localization (or the accepting of a local contract) was also influenced by the socio-economic situation of the employee's home country, among other aspects. This is particularly true for participants who chose to localize in Sweden. In this subtheme, I made use of not only participants' stories, but also of my observations and field notes, as well as my personal experience during my years living in Sweden.

As I stated in Chapter 1, the topic of this dissertation emerged during my observation of people going through the process of localization. I first heard about localization through listening to stories described by people at various locations where expatriates socialized, such as international schools, coffee houses. These stories were my first introduction to the phenomenon of localization of expatriates, and they inspired me to research this topic.

The observations and field notes I used in this description do not only refer to the participants enlisted in this study. Rather, they refer to other employees of Company A Sweden who left the organization while employed under expatriate contract. I did not formally interview these employees; nor did I try to enlist their participation in this research project. Given the criteria of eligibility of participants adopted in this study -

employees who, at some point in their careers, have transferred from expatriate to local contracts while employed at multinational organizations -, some of the people I observed would not have qualified to take part in this project. Nevertheless, my observations allowed me a greater insight into the decision making process of people who did decide to remain at an overseas location of their companies, particularly in Sweden, on a local contract.

More specifically, I jolted down in my field notes observations and short conversations I had with various people, employees at Company A Sweden, in regards to changes in the global mobility policy at Company A and any offers they may have received to remain in Sweden on a local contract at the time of termination of their expatriate contract. Given my dual nationality, I interacted more closely with people of either Brazilian or U.S. nationality. In this description, I related mostly general information I gathered through short conversations and observations. I made no attempt to disclose any personal information about the people with whom I came in contact with. This would not be appropriate, according to the Institutional Review Board requirements guiding this study.

In my observations, I noted that employees of particular nationalities, such as U.S. American, Brazilian were reluctant to accept the offer to remain in Sweden on a local contract. For different reasons, the option to transfer from expatriate to local contract in Sweden was not attractive to some employees. In general, most employees had embarked on an expatriate contract with the expectation of either returning to their home countries/home organizations or embarking on another expatriate contract to

another overseas location of Company A. None of them had contemplated the option to transfer to a local contract overseas, thus remaining in Sweden indefinitely after the termination of the expatriate contract. To most employees and their families, the expatriation was seen as a temporary situation. In some cases, the employees' spouses had taken a break in their careers to follow their husbands on the international assignment. They had plans to reengage their careers upon returning to their home countries. Most Brazilian spouses did not speak English (or Swedish). Hence their chances of employment in Sweden, or at most locations overseas, were limited.

Further, among Brazilian employees at Company A, the option to remain in Sweden on a local contract was not financially attractive, considering high salaries often paid in Brazil for qualified professionals. Given the strong sense of uncertainty created by changes in the global mobility policy at Company A and/or on the verge of a perceived imminent localization in Sweden, most Brazilian expatriate employees opted to resign from Company A Sweden. Among the employees I observed, they were hired by multinational organizations while still employed at Company A on an expatriate contract. They were immediately transferred to Brazil on local contract with the subsidiary of their employer. I noticed that the same multinational organization hired all Brazilian expatriates; one employee attracted others to also join the organization.

Among U.S. employees, the same concern regarding reduced income after localization was also true. Given better and more employment opportunities in the United States as compared to Sweden, most U.S. American employees were also not keen on remaining in Sweden on a local contract. Note that the reduction of income post

transfer to the local contract could be as much as 60% to 70%. All U.S. expatriate employees that I observed chose to leave Company A; they did so in reaction to either being offered to transfer to a local contract or after perceiving that this could a possibility at the time of termination of their expatriate contract. In my observation, I also noticed a strong sense of uncertainty among expatriate employees at Company A Sweden. As Company A was in the process of redefining its global mobility process, many expatriate employees felt highly uncertain about their future careers. I was able to observe a significant turnover of expatriate employees at Company A, particularly among employees whose home countries had superior employment opportunities and/or higher salaries.

Among the U.S. employees whom I observed, one declined the offer of a local contract at Company A Sweden and chose to return to the United States initially without employment. Soon after, however, he found a job position at an organization in his hometown. Another U.S. employee also opted to leave Company A; he was hired by a European multinational organization, and was employed on an expatriate contract in another location in Europe.

In conclusion, among employees from particular nationalities, such as U.S. American and Brazilian, the option to remain in Sweden on a local contract was not attractive, given the higher taxation and consequent reduced income after localization. These employees perceived that they had superior employment opportunities (with higher salaries) in their home countries or elsewhere. All employees had years of experience, some with further advanced degrees (MBA degrees). After their experience

of expatriation, they also had acquired work experience at an international location. Hence, they were highly attractive to many companies.

Among the participants in this study, Olga alluded to the fact that she had observed many U.S. American employees refusing the option to remain in Sweden on a local contract. She believed that only employees with either a family or cultural connection to Sweden would accept the transfer to a local contract, given the significant reduction of income. On the other hand, employees of other nationalities might welcome the possibility of remaining in Sweden indefinitely on a local contract. A British employee that I observed accepted the offer of localization in Sweden, upon not being able to secure a consecutive expatriate contract at another global location of Company A. In a brief conversation, he stated that his job perspectives in the United Kingdom were not much better than in Sweden, and therefore, the option to return to the UK on a local contract with Company A or any other company was not necessarily much better than remaining in Sweden on a local contract. In addition, his family was relatively well integrated to Sweden; he had an extensive network of colleagues/friends, his children had adjusted well to school in Sweden. Among the participants in this study, George, a British native, also alluded to the fact that his employment possibilities were not necessarily superior in the United Kingdom as compared to Sweden. Ernesto, a participant of Mexican nationality, noted that he did not want to transfer to Company A subsidiary in Mexico City, therefore, deciding to localize in Sweden upon not being able to repatriate to another regional part of Mexico.

> Many of them had a two-year contract and they went back to the States Yes, but they went to different jobs. They left Company A. I think 100% of them left Company A {*Interviewer: Do you happen to know if they were ever offered the opportunity to become local?*} Maybe some, some had an offer I know. But some got an offer but I mean nobody would accept becoming local in Sweden because of taxes. {*Interviewer: Were they Americans?*} Yes, not all of them. There was one Russian guy but he went back to the States. He would not even consider becoming local in Sweden {*Interviewer: And the not even consider becoming local, what was the big issue for not to do that*?} Income and opportunities you have in this country (Olga, interview 2, p. 6-7).

> Again I have a job and it is not so fantastic out there. (…) I like Sweden a lot. I like the people, I like the company. And I don't think I would be as comfortable at work, and potentially not earning as much if I were in the UK (George, interview 2, p. 21).

In conclusion, the option to remain indefinitely in Sweden on a local contract was acceptable to some employees, given various aspects –i.e. the economic, political, and social situation of their home countries/home organizations. For other employees, the option to remain in Sweden on a local contract was not acceptable for various reasons, such as spouse's ability to integrate and work in Sweden and better financial opportunities in their home countries or elsewhere.

Professional and personal opportunities in the country/facility of localization. The narratives of participants are also impacted by their localization in their particular

geographic/economic region. Among the participants in Sweden, their localization took place at the operational headquarters of Company A, the largest facility of Company A worldwide. Among the U.S. participants, their localization took place at three different sites: (1) the economic hub of two of the participant's employment industry; (2) the operational headquarters of another participant's employment company; and (3) the largest global facility of one of the participant's employer. Most participants discussed that their localization at each of its particular location allowed for good career advancement. On the verge of termination of their expatriate contracts, most participants evaluated the possibility of future career progression in their industries/employers, given the location where their localization took place.

Most participants in Sweden considered that professional opportunities were superior at the operational headquarters of Company A as compared to most global locations of the firm. One participant, Paolo, when approaching termination of his expatriate contract, considered moving to another global location of the firm, on a subsequent international transferee contract, but ultimately decided to remain in Sweden in part because of better career opportunities. The company's site in Sweden housed various different units of the business; hence, allowing more employment opportunities for employees. Paolo, for instance, found employment in another sector of the organization (research and development), and described that his professional trajectory since his localization had been one of "continuous growth" (Paolo, interview 2, p. 2) in various areas –professional responsibility, benefits, and salary. Ernesto, another participant, also described that the Swedish location provided more opportunities for

professional development as compared to his home organization in Mexico. Ernesto believed that the employees at Company A Sweden had opportunities for professional development that were "unthinkable" (Ernesto, interview 2, p. 12) in other parts of the world. This, he understood, was resulting from being the operational headquarters of the company.

> The point is when you compare the way you work here to the way you work in other countries in other factories…forget it!! [*strong emphasis*] You are very pampered here in Sweden! Uff…very, very pampered!! [*strong emphasis*] I mean, you have different things here that are unthinkable there –open training, let's say. You can do it whenever you want…{*Interviewer: No other factory worldwide you can do open training?*} No, not in the way you do it here in Sweden. In other factories, you are normally very tightly controlled on the finances and other stuff. And the central office normally is the one who has more luxurious types of things (Ernesto, interview 2, p. 12-13).

For dual career couples, the possibility of more employment opportunities at the location of localization was possibly even more important. Olga noted that she and her husband decided to transfer to a local contract at Company A Sweden because they believed that working at the operational headquarters location of the firm allowed both more career opportunities. Olga was employed in Sweden on an expatriate contract; transferring to another location overseas meant the often-difficult task of finding two positions at the same subsidiary for her and her husband. In addition, Olga perceived that working on a local contract at Company A headquarters gave employees better

chances of receiving a promotion. In contrast, she understood that Company A was reluctant to promote employees on an expatriate contract, given the temporary nature of their contract of employment.

> I think specifically for ZYB (*the location in Sweden*) it is better actually to be on a local contract. Because everyone is really cautious about hiring IT (*international transferee*) because if you would be on an IT contract my career would be limited. Because if I am to go to another place I'd have to get the same conditions and this is not the case. So it allows more flexibility or mobility with the local contract here in ZYB (city) –I am talking about Sweden, of course. (Olga, interview 2, p. 8).

In addition to better professional opportunities, all participants stated that Company A's headquarters location in Sweden was a welcoming place for all international employees. The majority of local employees were relatively familiar with international colleagues; many also had had an experience of living and working abroad. Further, the official language of the company in Sweden is English, which made the integration to work groups easier than it would have been at another global location of the firm.

In terms of personal opportunities, most participants described Sweden as a relatively easy place to live. Although many participants complained about the harsh winters and the high marginal taxation rates, they were complimentary of various aspects of life in Sweden. Ernesto highlighted the quality of schools, the overall good organization of society, and the social benefits of the country (e.g. health, pensions) as

one of the attractions for him and his family to localize in Sweden. Paolo noted that the country was relatively easy to live for foreigners compared to many other countries in the world, including his native Italy. George highlighted the common use of English by most Swedes, the easy way of fitting in for foreigners in society, the proximity (geographical and cultural) between Sweden and his native England, the good infrastructure provided by the country. George, in particular, demonstrated a keen appreciation for the country. George had been localized only for four months but, throughout the interviews, he frequently demonstrated an appreciation for Swedish culture and its people, and for Company A Sweden. From his viewpoint of a British national working in Sweden, his experience was very positive. In his words,

> (…) They make it very easy for you. And I don't know if I go to Nigeria if I will have a good time or an easy time. And if I have the same infrastructure or if I'd been much more on my own. And likewise, I don't know how would the experience be if someone came from Japan or move to Nigeria if they find it more or less attractive. . I think it is very easy to come to live and work in Sweden and work at Company A. It has been very straightforward to me. The difficulties are actually in leaving because there is so much to keep you here [*consideration in a low tone of voice*]. I have been very happy overall, yeah (George, interview 2, p. 20).

In terms of the negative aspects of life in Sweden, most participants identified the same issues: high taxation, unemployment, and poor integration of foreigners. Taxation was by far the most frequently cited reason of complaint of the participants in this study

regarding living in Sweden under a local contract. As previously stated, federal taxation in Sweden ranges from 28.9% to 57% (individual contributions), and 31.42% of payroll taxes. Under the expatriate contract, the participants did not pay taxes in Sweden because they were covered by the employer. Hence, once transferred to the local contract the change became dramatic to them. In many cases, it represented a loss of income of over 60%, considering that other benefits of the expatriate contract were also discontinued, such as housing, school tuition for children and airlines tickets to their home countries.

Olga, in particular, strongly complained about high taxation in Sweden. She had moved to Sweden from the United States, and described that most employees that came with her from the subsidiary in the United States refused to localize in Sweden in part because of high taxation. Although Olga's localization was employee-initiated, she admitted that she still had not accepted the transfer to Sweden on the grounds of the significant loss of income following her localization. Olga also complained about lack of jobs in Sweden; she did not see many benefits in becoming a localized employee in Sweden.

> But here is the tax [*strong emphasis*] the very simple thing that you don't see any money in your pocket, that's it, that's it! [*strong emphasis*] (Olga, interview 1, p. 11).

> No, I just don't see any (*good reasons to localize in Sweden*). For me, people normally talk about children and how good this is for children. Yeah, in the short-term when they are small children but when they grow up it is a

problem because they do not have enough work. You have a university system and they have a very huge unemployment among young people here. I just don't see any good things (Olga, interview 1, p. 7).

Paolo complained that Sweden did not integrate well its immigrant population, which was not very different from the manner his native Italy treated their immigrants. In his opinion, immigrants were welcome to live and work in Sweden but they were not easily integrated to society. He described that this feeling of not feeling integrated and of not belonging to the Swedish culture impacted his long-term plans to stay in the country. He understood his localization as an intermediate plan for his life and career; he did not have any intention to permanently settle in Sweden.

I think that Swedes force themselves to be tolerant but the result is that they don't consider the foreigner. You can come here and you are welcome as long as you don't bother me. No, I mean, this is why I think that they force themselves to be tolerant because you can come to this country, you can stay here, you can work, you can do whatever you want… but do not get in touch with me -this is how it is a little bit. I noticed, for instance, if you live in XYZ (*a city in southern Sweden*) -they have created areas for foreigners and for locals. I mean this is not said and there is no line dividing the areas - but this is how it is. I mean if you think about this area, what is it called ABC (*a district in the aforementioned city*) (…) Yes, in Italy it is a disaster but at least nobody says or claims that there is a good integration [*laughs*] I mean it is quite public knowledge that there is no integration at all! The foreigners that come to Italy

> they can complain and they have the right to complain; at least nobody says that we tried *[chuckles*] there is no understanding of that. And this is why one of the reasons that I cannot spend myself my whole life living Sweden because we will never adapt to the mindset; I am not saying it is wrong or it is right. I am just saying that I come from a different culture; to me it is fantastic to experience something else but for a limited time (Paolo, interview 2, p. 11-12).

Among the U.S. participants, the transfer to a local contract took place at three different sites/companies (1) the economic hub of two of the participant's employment industry; (2) at the operational headquarters of another participant's employment company; and (3) at the largest global facility of one of the participant's employer.

Rosa and Gustavo, both employed at Company B USA, a multinational organization in the oil industry, transferred from expatriate to local contract at the operational headquarters of their firm, located in the main economic hub for the oil industry worldwide. Both participants noted that becoming a local employee in the city of Houston, Texas, was a great advantage as it allowed employees the possibility of finding employment at other companies in the region. Gustavo remained at Company B after his transfer to a local contract. Rosa, on the other hand, resigned from Company B soon after her transfer to a local contract. Since her localization, Rosa changed employers twice, given the many opportunities and job offers she received upon becoming a legal resident of United States. Another participant, Pedro also transferred to a local contract at the operational headquarters of his employer –Company C USA. At

this location, Pedro noted that there were more professional development opportunities as compared to any other location of Company C worldwide.

Ronaldo transferred to a local contract at one of the largest facility of his employer worldwide. This facility was located in Mexico. The transition to the job had many challenges, both personal and professional. The transfer to local contract was, however, welcomed because of the great professional opportunities it entailed, including the management of 40,000 employees, more visibility within Company C worldwide and future career opportunities.

In addition to unique characteristics of each of the U.S. participant employers, the experiences of localization of U.S. participants were also greatly influenced by their transfer from time-limited work visas to permanency residency status (greencard) in the United States. All participants in the United States, except Rosa, had their application for permanent residency in the United States sponsored by their employers. This status allowed both their long-term permanency in the United States, as well as more freedom to work for other employers. Up to that point, the visa situation of most participants did not allow any change of employers; the work visa was often linked to employment at one particular employer. Hence, the transfer from the expatriate to local contract in the United States, and the consequent change of residency status situation, allowed participants more long-term employment opportunities in the United States, both at their current employers and elsewhere. All participants described the acquisition of the permanent residency status in the United States as highly desirable. This was very attractive for various reasons, such as size and stability of U.S. economy and labor

market, non-difficult integration of participants to U.S. business culture upon transferring to local contract, no additional challenge with spoken language at work (as compared to participants who localized in Sweden). For one participant, Ronaldo, the acquisition of permanent residency in the United States was a motivation to transfer from the expatriate to local contract. Ronaldo's employer, Company D USA, had sponsored Ronaldo and his family's application for permanent residency as an incentive to transfer Ronaldo from expatriate to local contract at one of the company's subsidiaries in Mexico. In Ronaldo's words, the permanent residency status granted him various benefits.

> It [*the greencard*] has a very high monetary value, and more because it gives you stability to stay in the United States, and to transfer within the company. When they [*the company*] gave me the greencard, they let go of the shackles that kept me at the company (Ronaldo, interview 2, p. 9).
>
> Tem um valor alto monetário e muito mais de estabilidade, né, de você ficar nos EUA e até poder transitar de empresa, né. Porque me deram o Green Card e tiraram a corrente que me prendia na empresa (Ronaldo, interview 2, p. 9).

In conclusion, the experience of transferring from expatriate to local contract at each of the participant's employer's facility and country of location significantly impacted their experiences of localization both in Sweden and the United States. Becoming a local employee at the company's headquarters allowed greater professional opportunities to most participants, from more accessibility to training and further development to more

availability of job positions to apply to. Becoming a local employee at a highly desired location (as in the case of Ronaldo) allowed for future career growth opportunities that compensated for the immediate loss of income after transferring from expatriate to local contract. The country where localization took place also greatly impacted the experience of employees transferring from expatriate to local contracts –it created both opportunities and challenges for participants in Sweden and the United States.

Theme 3: Personality characteristics. In the narratives of participants, it became evident that their personality characteristics played a vital role in the shaping their experiences of localization, and also of expatriation. This theme is divided in two subthemes: a) flexibility and resilience, b) self-management. In this section, I present the personality characteristics of participants as displayed not only during the time of their localization but also throughout their careers, and at the beginning of their international expatriate contract.

Flexibility and resilience

Throughout the interviews, the participants displayed a high degree of flexibility and resilience in dealing with the uncertainties that often mark the experience of moving to a foreign country for work. All participants described their expatriation making use of terms that expressed their excitement with challenges, new adventures, with situations where not all conditions were clear. Some degree of disorder and lack of clear guidelines was always recurrent in the narratives of all participants both in Sweden and the United States.

Most participants began their trajectory of expatriation amid a situation that at times was borderline chaotic. For examples, Ernesto initially only received only a verbal offer of an expatriate contract; guidelines were unclear in regards of housing, schooling for the children, and so on. Paolo had a convoluted employment situation in his initial months of expatriation; he was not able to work or live effectively in Sweden, that is he was unable to access the IT system of the company, or open a bank account and access medical system. Olga moved to Sweden with an infant child, an impressive feature for a dual career couple; childcare arrangements were not available upon her arrival, forcing her to struggle initially to find a nanny to care for her daughter. George was hired in a very unusual manner. He held a very complex contractual arrangement with Company A Sweden. He initially accumulated two job functions; throughout the duration of his expatriate contract he commuted between Sweden and the United Kingdom where his family resided. Among U.S. participants, Gustavo and Rosa were initially hired by a company yet to be established. Both held temporary expatriate contracts with Company B USA, and struggled in the initial months with a very unclear employment situation in the United States. Hence, all participants displayed flexibility in handling tremendous uncertainties and resilience to operate in an environment at times rather chaotic. While recounting their narratives they did so with some degree of humor and self-deprecation, and mostly a sense of accomplishment for having mastered a difficult situation. The words used by the participants to refer to their motivation to embark on the international assignment included “challenge”, “desire to try something new”, “adventure”, and “opportunity”. The participants either actively pursued or gladly accepted the

expatriation, and were flexible and resilient enough to deal with the uncertainties they encountered in the beginning.

For most participants, particularly those in Sweden, the months leading up to their localization were a period of exacerbated uncertainties. Most participants expected to return to their home country/home organization. They expected some form of career plan and career promotion to follow after the termination of the expatriate contract. In the months prior to the termination of the expatriate contract, most participants were either interviewing for jobs at other global locations of the firm, or were inquiring about job positions in their home organizations. That was a time of looking for employment opportunities worldwide; doing independent research to evaluate the feasibility of international locations; evaluating within the family the most desirable locations for employment; engaging in initial interviews and negotiation of contracts; and, ultimately, deciding on remaining in Sweden indefinitely on a local contract. To most participants, this was a period of intense stress that lasted for a couple of months. Two participants mentioned that it lasted between three to six months. Considering that most participants did not actively seek to remain in Sweden on a local contract, the final acceptance of their transfer to a local contract was in itself a very flexible move on their part. Their enduring of this experience of inadequate career management, without faulting or attempting to leave the organization was also a demonstration of great resilience on their part.

Paolo explained that he was able to deal with the uncertainties of the process of not knowing what was to follow after the expatriate contract but for his wife the situation

was reason for unbearable stress. She expected that Company A would provide more guidelines and perhaps assistance. In his words,

> When you start in another country doing something, you should know why you're doing it. Not only do it and then let's hope there is something; because then you can localize, you can keep on traveling, you can go back - but it should be clear from the beginning. In this way you avoid the frustration of the person by the person finding out by himself or herself. Even like I said before I like a little bit uncertainty, but this is a personal thing, for instance, my wife got crazy when I said I still don't know what we will do. I mean, it is a different personality; for her it was fundamental to know everything –we try to know but… (Paolo, interview 2, p. 15).

Most participants accepted their localization in Sweden as a temporary career move; they still aimed at securing another position worldwide with either Company A or another employer. In the narratives of most participants (Paolo, Olga, George), they viewed their transfer to a local contract in Sweden as a "waiting period" while hoping/searching for better employment opportunities ahead. The participants seemed to accept their localization with both flexibility and resilience, considering that none of them had actively pursued their localization and that the transfer had come, in most cases, with various unintended consequences, e.g. unanticipated long-term transfer overseas; rupture of ties with their home organizations; salary reduction of above 60%; adjusting to the new environment without the sheltering protection of the expatriate contract. Although their repatriation to their home countries/home organization would

also have represented some re-adaptation to a new situation and some form of salary loss, it is likely that the participants would have returned to a more familiar environment where it was likely easier to re-adapt to the new circumstances and retool for the future. In addition, their spouses would have been able to return to their careers, thus the family would not need to rely on only one income. Hence, the participants' long-term stay in Sweden on a local contract was a sign of both flexibility and resilience in dealing with a situation that was far from their initial career plan, taking into consideration that none of the participants embarked on the international assignment with the ultimate objective of immigrating to Sweden.

Further, another evidence of the participants flexibility was that they actively pursued professional development and career opportunities at Company A in an environment not necessarily familiar and/or providing of equal opportunities to all employees. Paolo noted that it was a challenge to learn to position one self to better career opportunities, in the particular business/culture environment of Swedish companies, where self-marketing was not necessarily appreciated or the best approach to secure future career opportunities. Paolo succeeded in figuring out his way at Company A's particular business culture as he did experience both professional success and financial gains since his transfer to a local contract. Ernesto noted his frustration with the fact that non-native employees were often sidelined for career promotions at Company A. Both Ernesto and Paolo noted that it was necessary for employees to create many ties across the organization in order to assure equal career opportunities at Company A Sweden.

{*Interviewer: But as you mentioned, since here things are so low key in promoting yourself - how do you do that*?} Ahhh, it's a strange situation [pause to ponder] it is not by showing up as it might be in another country by becoming a kind of showman or showgirl or whatever [*laughs*] in order to be noticed. Here it is a more quiet way but it is the same, it is networking, knowing as much people as possible then you become less vulnerable to end up in this kind of situation (Paolo, interview 2, p. 16).

Self-management

Throughout the interviews, it also became evident that participants, both in Sweden and the United States, displayed a high degree of self-management. Most participants were very proactive in handling their own personal and professional lives; were active in seeking further training and mentoring relationships; as well as better job opportunities in their organizations or elsewhere. They were also able to negotiate good contractual arrangements for expatriation and localization. Further, most participants were very reasonable in terms of what they expected from their companies in the handling of their contracts. They were ready to assume responsibility in seeking better employment opportunities for themselves.

High degrees of self-management were a common recurrence to participants both in the United States and Sweden. Among U.S. participants, Ronaldo, in particular, was very active in seeking better employment opportunities, where he could learn and grow in his knowledge and skills since the beginning of his career. Ronaldo had various job changes, and always aimed at joining organizations that allowed him the possibility of

growth and development. In addition, he actively pursued further education and training. Ronaldo earned his professional degrees while working full time and attending evening classes. He was also very active in harnessing a vast network of contacts that served as his mentors whenever mentoring relationships were not available at his employers. Like Ronaldo, Pedro also actively pursued opportunities and successfully established a solid network of contacts, mostly outside of his organization that served as his close mentors throughout his career. Gustavo, another participant, had actively pursued all career positions that he had at Company B USA. Gustavo was the only participant who had various experiences of both expatriation and localization. He described that each of his position was consciously harnessed and secured by positioning himself in a manner that made him both highly visible and desirable for future projects in various locations of Company B worldwide. Further, Gustavo had been actively learning about different forms of contractual employment at Company B USA. In the absence of sessions to clarify different HR matters, Gustavo took upon himself the task of learning and managing his career in order to secure a better employment situation for himself.

Among the participants in Sweden, high degrees of self-management were also common. Ernesto initiated most of his career transitions, at some point even starting his own consulting company. Upon joining Company A on an expatriate contract, Ernesto and his family engaged actively with the relocation agency to secure a smooth transition to life in Sweden. Ernesto maintained a close contract with the HR department of Company A to make sure he was well informed and up to date on matters related to his expatriate and local contract. He was very pro-active in handling his transfer to local

contract. He somewhat relied on the assistance of Company A but mostly he understood that the transition was his own personal responsibility, and a sign of maturity of the employee to handle the consequences of termination of the expatriate contract. I noted during the interviews that Ernesto had a very outgoing personality. He greeted his colleagues enthusiastically and kissed his female colleagues on the check when we walked to the room where the interviews took place.

Paolo was also very proactive throughout his professional life. He initiated all his job transfers, including his transfer from expatriate to local contract at Company A Sweden. He did so after realizing that a job position was not available at his home organization in Italy, and with the intention of transferring to another side of the business where he could acquire new knowledge and skills. Without any assistance from Company A, Paolo took charge of his career progression after termination of the expatriate contract. He also took upon himself his adjusting to another section of the firm, since no particular training program was available at the organization. Olga was also very proactive in seeking professional development and career opportunities. Since the beginning of her career in Russia, she consistently pursued training and mentoring relationships. She accepted expatriation to the United States with the ultimate goal of pursuing a MBA degree. Upon transferring to Sweden, Olga reached out to her network of contacts to compensate for the lack of support from Company A to provide childcare for her infant child. Upon transferring to the local contract, Olga took care of most of the necessities resulting from the localization, such as finding a home and getting a driver's license. She did not expect to receive any assistance from Company A. Olga was very

independent, and did not want to "waste time" (Olga, interview 2, p. 6) searching for institutional assistance.

Like other participants, George demonstrated a high degree of self-management since the very beginning of his career. At his first employer, he pursued additional training, completing all available modules after work and on the weekends. In addition, George acquired further management educational degree (MBA), paying himself for the costs and taking evening and online classes while working full time. Upon joining Company A, George engaged actively with colleagues and mentors. He was a tough negotiator when it came to negotiate employment contracts. Consequently, he was able to secure both very generous expatriate and local contracts at Company A Sweden. All along, George had in mind a clear long-term plan for his career and was willing to take bold steps to achieve them. Throughout the interviews, George portrayed himself as a very determined, hard working person, who was also very conscious of his value to the organization. George was the only participant with whom I felt intimated at first. He was almost overpowering because of his eloquence, fast thinking and speech, and strength of mind. As the interviews progressed, we bonded really well. George was extremely generous and forthcoming in sharing with me rich details and profound thoughts about his career and his experience of localization.

In summary, all participants displayed high degrees of self-management, flexibility, and resilience in handling their experience of localization. These characteristics were fundamental for the participants to accept their localization at the overseas location. They also significantly shaped their experiences of localization,

considering the context and circumstances of uncertainty and rupture that the long-term transfer to the international location and organization represented to their lives and the lives of their families. The following excerpts of the interviews illuminate the personality characteristics of the participants.

> You need to look ahead in the sense of what will happen when I do this. If I become local, what are the consequences? First of all, money…look at, what are your normal expenses right now…okay, what from these expenses I can live without in the future?...and then you adapt period! The expat needs to think about that before becoming local {*Interviewer: And is it something that it is done personally within the family rather than with the company support*?} Yes, of course, the company does not support you in that sense. I mean, it is maturity, it is your own adulthood in the sense that you know what you are doing. The company will not be your father, your parents telling you want to do, "Come on, Tania, please do this, think about this, have you done that". I mean, come on, you are an adult! [*strong emphasis*] You need to do it yourself. Forget about being an expat or not! You will do it in your home country, no matter what. If you don't, sorry, you are dumb! (Ernesto, interview 2, p. 9).

> I even didn't think that I can ask questions oh, what to do about driver's license. Of course, I was asking here and there, my friends, but not the company at all. I had no expectation for the company. (Olga, interview 2, p. 6).

> {*Interviewer: And then basically the personal negotiation that you managed*} Yes, it is a one-time opportunity you have and then again I had a very

> serious and credible - I walk-away or I-stay kind of situation. I am not from Sweden, I don't have any ties here really, a few friends and things but I could in theory easily walk away, then good luck finding someone else, you will if you keep looking, there are people our there, it shouldn't be a big deal for you, although it's not that convenient. But if you want the person who spent five years developing others and deploying what I built then fine…{*Interviewer: I can see that your individual characteristics of being very much engaged into this. You had a plan from the beginning, from the time you left college to spend two years at this company, and getting an MBA I am going to pay for that, you were very engaged at all times. And it was not like you expected the company to take care of this for you*} No, not at all. Of course, the risk is a lot on my side so I have to put my money where my mouth is. I need to walk the talk, whatever. I made all of these choices so I try to be flexible for the company with travel, with leaving family, with working ridiculous hours, so that's been my contribution. And then of course I expect to have a little back. (George, interview 2, p. 14).

Theme 4: Family. Several participants discussed the role played by their families in various aspects associated to their expatriation and, in particular, to their localization. The family unit served both as a motivator to take on the expatriate assignment, and later, as a resource during the time of expatriation and localization. Most participants noted the supporting role played by their spouses in assisting them during the process of transitioning from expatriate to local contracts. This theme is divided in two subthemes: a) opportunities; and b) support.

Opportunities

Several participants (Ernesto, Paolo, Pedro, and Ronaldo) identified that one of the main motivators to take on the expatriate assignment had been to provide the family with opportunities for development and personal growth, through international schooling for the children and the possibility of living abroad. At a later time, during the moment of transferring from expatriate to local contract, the need to assure opportunities for the family were also important factors on deciding whether to remain indefinitely overseas on a local contract. Two participants, Ernesto and Paolo searched for job positions at various international locations of Company A. Ultimately, they decided not to take those positions in part because they were located in regions deemed not ideal for their families in terms of safety and personal and professional opportunities. Ernesto considered taking a job position in Italy but declined because of lack of nearby schooling for his children. Ernesto's transfer to local contract in Sweden was in part motivated by good educational opportunities for his children. Likewise, Paolo declined to take a position in Nigeria due to concerns with the safety of his family. Paolo initially wanted to repatriate to his native Italy where his wife could resume her professional career. His localization in Sweden was because of lack of a job position in the subsidiary of Company A Italy. The decision to localize in Sweden was a compromise that made possible for Paolo to have an interesting job position, and allowed both his wife and children to remain relatively happy in Sweden. Paolo said,

> It came out that I stayed in Sweden. There was an interesting position in Sweden, my kids are happy at school that they are and my wife is happy enough

> [*laughs*] not fantastic but happy enough. It was a compromise among several factors (Paolo, interview 2, p. 2).

Olga pointed out that family needs were in the forefront of her decision to transfer from expatriate to local contract in Sweden. Her husband had a local job at Company A Sweden, and was not particularly interested in moving to any international subsidiary of Company A. As they were a dual career couple, it would have been an additional challenge to find two desirable positions in the same subsidiary of Company A worldwide. Olga's husband also wanted to remain closer to his aging parents in Russia. Olga noted that she had not fully accepted her localization in Sweden, in part because of the significant income reduction. She agreed to localize primarily because of her husband decision to remain in Sweden.

Family reasons were also on the forefront for Rosa, also a female expatriate employee while until under her expatriate contract. Rosa tried to find another international contract with Company B. Her husband also worked for the same employer; hence they had to find two job positions at the same international location of Company B. The decision to remain on a local contract in the United States was resulting from not finding two job positions for herself and her husband. At a later time, Rosa's husband started his own business, making it impossible for the family to leave the city of Houston, Texas.

Family needs were also the primary reason for George's decision not to expatriate to other international locations of Company A. George's family had refused to move to Sweden, and would not accept many locations worldwide. His wife was

employed in the United Kingdom, and had never seen any benefit from moving to Sweden with their children. George ended up remaining in Sweden on a local contract in part because of unavailability of any positions at any location worldwide where his wife would agree to move. His family continued living in the United Kingdom. His transfer to a local contract in Sweden allowed some form of continuity to a way of living that they had had for the past five years.

Support

Several participants described that the family unit, in particular, the spouse, was an important source of support and stability during both expatriation and localization. Amid an environment characterized by many uncertainties and isolation, the spouse (often the female spouse) was, in most cases, the only constant resource available for the expatriate. They often played a multitude of roles: seeking out information, networking, assuring the smooth transition of children at school/international location, even serving as mentors in the absence of established mentoring relationships at work. Male expatriates particularly relied on the assistance of their spouses. Female spouses often moved to the international location without employment, had more time available to assist the family, and lived in an environment that was markedly feminine. Activities available through the international school, expatriate clubs, etc. were geared mostly for female spouses, and therefore, became mostly spaces of feminine dominance. This situation was more obvious in Sweden where I had the opportunity to spend more time in the community of expatriates.

Ernesto described in rich detail the assistance he received from his wife. Ernesto's wife assisted in different manners during the period of family expatriation and localization in Sweden. At first, she engaged constantly with the relocation company contracted to assist them at the time of their move to Sweden. Ernesto said his wife had a notebook of questions she posed to the relocation agency, in order to make sure the family had a smooth transition to Sweden. During the years of expatriation, Ernesto's wife had a very positive outlook towards living abroad; she engaged the children in various activities and helped them enjoy their time in Sweden. Company A allocated a budget for language training and culture training courses. Ernesto's wife took advantage of this and did learn to speak Swedish, which Ernesto himself did not. Her learning of the Swedish language allowed the family to gain more understanding of various aspects of life and culture in Sweden, thus be more fully integrated into the society. At the time of his transfer to the local contract, Ernesto's wife was extremely instrumental. In the absence of adequate services for assisting the family becoming local in Sweden, she took upon herself the responsibility of finding a home, figuring out medical services, even creating a protocol of questions for Ernesto to ask the HR department. She served de facto as his mentor during the transfer to the local contract. At that time, Ernesto did not have any mentors at work and did not know any other expatriate transitioning to local contract. Ernesto credited his wife for the success of the family in Sweden, both under expatriation and localization. He described that she became a resource not only to their family but also to other Mexican colleagues in the organization. Further, Ernesto noted the role played by the family unit, the spouse in particular, as fundamental to the success

of the experience of living and working abroad. I share below some excerpts of Ernesto's narrative describing the support provided by his family/wife:

> *{Interviewer: And how was it?* [*finding housing after localization*] I fortunately…the one thing, I have a very intelligent wife -she researched the whole thing, she looked for everything, she speaks the language…I mean, she is good! Because of her, we were basically very successful here. It was very good, very good! She found 20 options to choose. I said I will not look at 20 houses…[*laughs]* Forget it! I mean, you choose, I said, I don't care. (Ernesto, interview 2, p. 7).
>
> As an expatriate person if your family does not support you, you are killed period! You are killed! [*strong emphasis*] No matter how good you are, no matter how fun you have at your work, with your bosses, with the company…if your family is not happy, forget it! (…) They are the ones that really sustain the whole thing. How eager they are to immerse within the new society (…) Exactly! Sweden is very simple because everybody speaks English, let's say. You lose a lot going into their culture and way of thinking for not speaking the language. My wife that does speak the language is the other way around; she understands…once again, it is your own personality, your own skills, and how open you are to that kind of thing. (Ernesto, interview 2, p. 7-8).
>
> I mean, I would say that it would have been nice to have someone [*a mentor*] on that part. But once again it is your personality, and in my case, I have a lot of support from my wife. She was the one doing the homework, to be

> honest. So I relied on her completely. The questions that I could think about she was the one that brought in, and then I tried to find the answers here at Company A with my colleagues in HR. {*Interviewer: She was giving you the questions to ask?*} Truly! Truly! And you should see her, even the HR ladies remember her, when we met them my wife had her own notebook with all the questions. She would say, "Tell me about this, tell me about that, what about this, what about that?" She is like this! When we first arrived here, and had the meeting with the relocation agency, she always had many questions. She would ask many questions about where to buy stuff, about the doctors, whom to contact in case of fire. She had very reasonable questions! So I rely on her! That's why I married her! [*laughs*] Whether I missed a mentor? Very, very little! I would say. {*Interviewer: Because you had one*!} Yes, I have my wife! It is more like an angel on my shoulder telling me what to do! [*laughs*](Ernesto, interview 2, p. 12-13).

Paolo's narrative gave another glimpse of the experience of spouses under expatriation/localization. Although the spouses' support was instrumental to the success of the family, this assistance often came at a high cost for the spouses - i.e. lack of support network abroad, high dependence on the husband, lack of employment opportunities, and so on. If under expatriation the extra resources provided by the expatriate contract justified this situation, upon localization the significant reduction of income often created a situation of high stress. Most families could no longer rely on only one income. At the same time, finding employment, particularly in Sweden, proved

to be not an easy task. Paolo's wife, for instance, was not able to find employment although she did speak English, was conversant in Swedish, and had a Master degree. The transfer from expatriate to local contract, with the consequent reduction of income it represented, was also a moment of transition to the spouses and the whole family. Paolo explained this situation.

> I think that the family part, unless you are a single person, is very important! When you start moving abroad and especially when you localize because there are quite big changes. I mean, when you are an expatriate you get used to a certain standard of living. When you go back to your countries it is already difficult because you need to go back to your previous way of living. And if you stay abroad and localize is even more difficult because you need to adapt to a new way of living that is not in your natural environment. So it is quite demanding especially for the people that accepted to be part of it without driving it. My wife, I think, was in that position; sometimes she gets frustrated because she's not working. And finding a job in Sweden now is not really easy if you're not skilled with the language. I mean you can manage but you are not fluent; there is quite a lot of competition… I mean there are many people that are looking for jobs. And in Sweden having a degree or a Masters does not differentiate very much because almost everybody has it. So it is not that you can have something special or more compared to the others. It might be even less because you may have a degree or two but you are still a foreigner (Paolo, interview 2, p. 7).

Female expatriates, on the other hand, often did not rely on the assistance of a non-working spouse. In the case of Olga, both she and her husband were working since the first day of their move to Sweden on the expatriate contract. They had an infant child to care for. They encountered at Company A Sweden an environment that was largely oriented towards male expatriates, which assumed that there would be a non-working spouse at home to care for the children. Olga had great difficulties with childcare services for her daughter and had to pay heavy fees for private nanny services.

George's narrative of expatriation and localization was marked by the fact that his spouse never did move to Sweden. George noted that he never did live as a regular expatriate employee. He did not spend weekends in Sweden, did not socialize frequently with other expatriates after work, did not have children attending the local international school, did not have a spouse attending events at the local expatriate club. In any event, George's narrative was very helpful for my understanding of the expatriate community in Sweden. His narrative of not belonging to the expatriate community of employees of Company A helped me create a picture of the typical arrangement and dynamics of this group of people. As described by many participants, Company A Sweden did not organize expatriates in any particular group or segment. Given the large international diversity of employees at Company A Sweden, it was difficult to identify the type of contract an employee had with the organization. In addition, expatriates did not purposefully identify themselves as such to others because of their concern that the generous income they were receiving might cause feelings of resentment among regular employees. Hence, at the workplace it was not easy to identify who was or not under an

expatriate contract. However, the identification of the expatriates was very clear in other spaces in the region were expatriates interacted –i.e. international school, social clubs, sport venues, and so on. Considering the fact that the expatriate community in southern Sweden was relatively small, most expatriates interacted in the same handful of locations. These locations were spaces of clear visualization and identification of expatriates. Expatriates of all international companies in the region met at these venues. As Company A Sweden was the largest employer in the region, the expatriates from Company A had the largest presence in these spaces for socialization of expatriates. Through these venues of socialization, expatriates identified one another and interacted as a group, thus forming a social support group and also a venue for definition of their social identity as expatriates. In addition to public spaces of socialization, most expatriates met at each other homes, and actively organized coffee morning, parties, BBQs, etc., often only inviting people employed at the same organization under expatriate contract. The spouses dominated the public spaces of expatriation and, in general, were in charge of organizing activities at their homes, thus shaping their private spaces of expatriation. Their dominance of these spaces was obviously resulting from the fact that their life in Sweden revolved around the activities of the children and their spouses, and from the fact that they had both time and necessity to reach out to others to form a social support group. Hence, the role played by the spouses was also one of creating a social identity for the family. This became evident when I contrasted the information provided by three participants –Ernesto, Paolo, and George. Both Paolo and

George's narratives provided rich details of these "spaces of expatriation" - places occupied primarily by female spouses.

Further, Ernesto's narrative provided additional information in regards of the high expectation of the spouses in terms of the assistance they expected from the company at the time of transferring from expatriation to local contract. Their behavior may as well be an indication of loss of identity felt by the spouses upon their husbands transferring from expatriate to local contract. In addition, my own tacit knowledge of having lived in Sweden for four years, of interacting and socializing with the spouses in these "spaces of expatriation", allowed a better understanding of this reality of social identity construction of expatriation via the family and the spouse. Below I share excerpts from the interviews of the three participants in regards of this reality.

> {*Interviewer: Did you have much contact with other expatriates that came at the same time that you came?*} I think we were few in the whole plant here. Honestly I did not have any contact with them. The social network became more the international school; that was the point where most of the people were exchanging information. {*Interviewer: Even Company A people?*} Company A, the few that were here; but also from other companies; XYZ was very strong still so there were a lot of Japanese coming here. It became quite interesting to exchange experience and solutions with them to deal with different topics, from private perspective to everything else; without unveiling company's secret but it was more practical solution for anything that was ongoing at that period (Paolo, interview 1, p. 7-8).

I mean I did not feel that I was part of an expat community before. I think you feel more like that if you are physically here on weekends and so. Because those guys had fun, you know. They had money and they went to each other's houses and apartments and had parties and met each other. They kind of had more of a social network - that's what counted for them. They got a better understanding of that than I had, so I tapped into those people. But I wasn't here on the weekends; my family wasn't very often exposed to that. So I didn't feel like. Actually on-site at work there isn't anything to feel like you are part of a group of people; it's more like you keep it quiet because you know you're earning twice as much as someone doing the same job. So you know it's not super exposed that you are on an expat contract. Of course it comes out, you know. (George, interview 1, p. 18-19).

There are some people that think that the company should solve all the problems. And, you know, sometimes is not the employee himself that thinks that but the relatives, the spouses, that push them…they say, "Ask Company A for this! Ask Company A for that! Company A brought you here they should pay for this". Some of them [*requests*] are reasonable, if you think about it. But if you did not negotiate for that, dear, sorry –forget about it! It is ridiculous!! [*strong emphasis*] They want Company A to pay for cleaning the house, it is lousy! But what the heck? It is your house, so you need to do it yourself! So you see, some of these inconsistencies come from the spouse. From the people that transfer to work here, not that much –I would say. {*Interviewer: So not the employee itself,*

but the family members –that's interesting!} Yes, the family member. As I told you, I have lots of chats with the HR ladies on the international transfer section and they told me about these things. They say, "I receive a phone call from this lady and they want us to pay for this and for that…"{*Interviewer: So the spouse, you mean*?} Yes, the spouse {*Interviewer: So it is not necessarily the nationality of the employees…*} [participant nods in agreement] You know the higher in the organization the transferee is, the spouses feel that the company needs to pay more for the whole thing. Let's say, if I am a manager, the spouse does not request much of that. But also it depends on the mentality of the spouse, the maturity of the spouse. But is you are the VP or a top director, some of the spouses think that Company A brought me here and especially if they had two or three transfers already, they feel that they deserve more. I have a couple examples of that –that was a nightmare experience! The higher in the organization they believe the company should pay for everything. {*Interviewer: So the longer their engagement as an expatriate they more they feel…*} that they deserve more {*Interviewer: But then again the impact on their personal lives is much more…*} of course, of course! You are an employee you know up where to pull the company, right? And that's it! It is a kind of a hard time but then again it depends on the people. Depends of the people (Ernesto, interview 2, pp. 12-13).

Theme 5: Sense of belonging. Among participants both in Sweden and the United States, several key elements were recurrent in their narrative of making sense and understating their social identity prior to and after expatriation-localization. Although

participants described their own experiences and viewpoints, they each touched on relative similar issues when considering changes to their social identity under expatriation and localization. In their narrative, a key common element was their reflection on their sense of belonging in regards of various spheres of their lives –i.e. their current and past employers; their community; their country of birth; their country of residence. Although each participant elected different paths in reflecting and assessing their sense of belonging, they shared in common an appraisal of their group membership prior to and after expatriation-localization.

It is important to note, at this point, that participants in Sweden and the United States were at a different moment of their permanence in their countries of residence on a local contract. The participants in the United States had been there longer; on average 5.6 years, with a range of 2 to 10 years. In contrast, the participants in Sweden had been there for a much shorter period; on average 2 years, with a range of 4 months to 2.7 years. In addition, there was a relative disparity of narratives in regards of their general feelings towards their countries of residence. Although no participant (either in Sweden or the United States) stated that they embarked on the expatriate assignment with the purpose of immigration, it was evident that the participants in the United States were rather pleased with their localization. In contrast, only one participant in Sweden was somewhat content with his localization and indefinite stay in Sweden. This was rather remarkable because when asked who initiated their localization, all participants in the United States declared that it was company-initiated while all but one participant in Sweden declared that their localization was employee-initiated.

In general, the experience of localization represented a moment of significant rupture and deconstruction to all participants. It was a moment of severing the ties of employment with their home organization; it was a moment of abandoning the certainty that one may return to their home countries in the short term; it was a moment of redefining their sense of self. The interaction of participants with others (colleagues, friends, family, community) shaped the manner in which each participant navigated this experience.

Half of the participants (Pedro, Ronaldo, Gustavo, and Paolo) transferred to a local contract upon a job change. Hence, their localization also represented a rupture with immediate work groups. Feelings of lacking of a sense of belonging were more acute among this group. Ronaldo, in particular, became a local employee at another geographical location (Mexico) of his company. At this location, he was a local U.S. employee (of Brazilian nationality) working among mostly Mexican nationals. There were no other expatriate or localized expatriate at work. Ronaldo did not share any common experience with most employees. Similarly, Paolo described that he started his new position at Company B Sweden in an environment mostly occupied by local employees. In addition, Paolo's social group of interaction outside of work greatly changed after his transfer to a local contract. He no longer dealt with expatriate employees, nor did he interact frequently with people who had transferred to a local contract. Although new expatriate employees were constantly arriving in the region, Paolo felt that he no longer belonged to that group. Another participant, Gustavo, described that his experiences of localization in the United States were marked by a lack

of sense of belonging. Gustavo transferred to Company B USA a couple of times on a local contract but always had difficulties in figuring out where he belonged. He felt lost amid a large group of diverse employees on different types of contract that could not easily be identified. In contrast, all his experiences of expatriation had been marked by an immediate integration to the group of expatriate employees, with whom he shared common experiences.

Half of the participants (George, Rosa, Ernesto, Olga) transferred to local contract while remaining on the same job position. Nevertheless, their localization was still an important moment of reflection and self-evaluation. Participants reflected, in particular, on their unexpected long-term stay in a foreign country; on the fact that somewhere down their employment trajectory the experience of expatriation suddenly became an experience of immigration. The time of localization was a moment of negotiating and modifying their sense of belonging to various spheres of life, including workplace, community, and country of residence. In most cases, this was a long process of reconstructing of their social identities and negotiating their integration (or not) to a foreign culture. In this regard, there were significant differences between participants in the United States and Sweden.

As stated, all participants in the United States were of Brazilian nationality. The average duration of their time under local contract was 5.6 years. Two participants were married to U.S. citizens; the remaining two participants had Brazilian partners (wives) and children. For all of them, the transfer to a local contract began with the acquiring of the permanent residence in the United States. Most participants described the symbolic

ritual of acquiring permanent residence in the United States, and later U.S. citizenship (Rosa and Pedro), as defining moments in their lives. It was a moment of marking their appreciation and acceptance of U.S. culture, which significantly influenced their social identities and long-term career and professional plans. Pedro noted that his localization, followed by his permanent residence and later U.S. citizenship, marked a moment of more engagement and responsibility towards his country of residence. After nine years in the United States, his localization was a moment of profound transformation. He gave up plans to return to Brazil. He became more concerned with keeping a balance between U.S. and Brazilian culture. Pedro said that he absorbed U.S. work values and behaviors but maintained a strong Brazilian cultural identity. His family spoke Portuguese at home; he interacted constantly with a number of Brazilian immigrants in his community of residence. He and his family were very active in a local Brazilian church; his extended network of Brazilian friends in the U.S. northeast was composed of more than 500 families. Ronaldo also described a similar process of integration to the U.S. culture, particularly after he changed employers after his localization. Ronaldo noted that he absorbed a professional U.S. identity while maintaining a balanced U.S.-Brazilian cultural identity. Ronaldo and his family were well integrated to the large Brazilian community in Miami, Florida; they were active members of the local church.

Rosa described that the transfer to local contract as a difficult moment that forced her to redefine her initial plan of having a global career (with various posting overseas) and of eventually returning to her native Brazil. Rosa, who was married to an American citizen, noted that her localization started a long process of integration into the U.S.

culture, similar to what most immigrants endure. In Rosa's word, the transition was a "psychological process of coming to terms with the fact that you are putting down roots in a country that is not yours" (Rosa, interview 2, p. 5). During this time, Rosa interacted mostly with her husband and his family, as she did not know any employee going through the same transition.

Among the participants in Sweden, their time of permanence in the country since localization was shorter as compared to that of participants' in the United States. The average time after localization was 2.0 years, with a range of 4 months to 2.7 years. The participants were of different nationalities (British, Mexican, Russian, Italian). All were married to people of their own nationality; all except one resided with their spouses in Sweden. All participants in Sweden did not speak Swedish. As stated, the motive of their localization was employee-initiated, with the exception of George. However, upon close observation of their trajectory of localization in Sweden, it was obvious that most participants transferred to a local contract mainly because of lack of professional opportunities in their native home countries/home organizations or elsewhere. Therefore, the affirmation of participants that they initiated their process of localization in Sweden was somewhat misleading.

The participants described their trajectory of redefinition of social identity through the lens of their sense of belonging to their employer, work groups, and country of residence. Ernesto's narrative highlighted, in particular, his sense of belonging to his current and past employers. Ernesto noted that he never did feel part of the corporate culture and teams of work at Company A Mexico or Sweden. He believed that Company

A was plagued by a very political internal environment, and a very fluid corporate identity that did not build strong ties with employees. In contrast, he spoke keenly about his emotional attachment to his first employer in Mexico because of its strong and uniform culture throughout the organization, where employees joined the organization as interns and then stayed on for most of their careers. Ernesto noted that his understanding of Swedish culture was very influenced by the ways of operating of Company A Sweden, which may be a very particular bureaucratic way of Swedish corporate environment. As Ernesto had only worked for Company A Sweden, and did not speak the native language, his understanding of integration to Swedish culture was established through his ties of employment and work group membership at Company A Sweden.

Paolo's narrative of social identity highlighted pressures he felt among his colleagues to adopt a Swedish style of business behavior upon his transfer to local contract. There was an expectation that he adopted a more transparent style of leadership. There was an expectation that he understood and abided by Swedish labor regulation. There was also an expectation that he learned to speak Swedish. Paolo described that he often played with his residency status in the country, never openly disclosing to anyone that he had become a local employee. In his words, whenever asked by his colleagues about his residency status he would answer, "Yes, I am local but I would not stay here forever. Don't worry" (Paolo, interview 2, p. 10). Within his family, they viewed their long-term stay in Sweden under local contract as long-term but not permanent. Paolo shared one incident where his children asked if they would stay forever in Sweden or would eventually leave like their school friends. Paolo explained

that they would stay “a bit more in Sweden” (Paolo, interview 2, p. 10). In Paolo’s narrative, he highlighted the lack of integration of immigrants in Sweden, which ultimately did not make him feel at ease with staying longer in the country. He viewed his localization as a temporary career move. He did not feel any great sense of belonging to his country of residence, or to any particular work group at Company A Sweden. In his personal life, his localization had caused him to relinquish ties to the expatriate community with whom he socialized while under expatriate contract.

Among all participants, Olga was the most critical of her country of residence. She complained about high taxation, lower wages, unemployment, and so on. Upon her localization, Olga maintained the same job position and dealt with the same colleagues. No one except her family was aware of her transfer to local contract. In her personal life, there were no significant changes to her network of friends. Olga was a private person and did not have an extensive network of friends prior to or after her localization. Olga viewed her localization as a mid-term career move. Her children were young; her husband’s aging relatives needed them to live close by. Olga did not feel any particular sense of belonging to Company A Sweden, or to her country of residence. Her plans were to find employment in some other country, possibly the United States. In her words:

> But don't see this [localization] as permanent. I don’t want to think as this as permanent. But you never know, you never know {*Interviewer: And you don’t want to see this as permanent because…*} I just don't belong here. I don't belong in here. (Olga, interview 2, p. 10).

Among the participants in Sweden, George was the only one to declare his localization as company-initiated. Paradoxically, compared to other participants, he was the only one who felt a stronger sense of belonging to both Company A Sweden and to his country of residence. In George's case, it is important to note however that he had been under a local contract for only four months. In addition, George received a very generous package to localization, with benefits extending over a four-year period and with no virtual reduction of income for the first year. George felt well integrated to his work group. George also appreciated the corporate culture of Company A Sweden, and the way of life in his country of residence. Since his localization, George described that his mindset had somewhat changed. He started to contemplate the possibility of remaining in Sweden (at Company A) for an indefinite time. He was also open to the possibility of embarking on another expatriate contract as he believed that Company A had somewhat extended the benefits of his expatriate contract in an attempt to find George another expatriate contract overseas.

In conclusion, the narratives of participants in Sweden and the United States in regard to their social identity, in particular their sense of belonging, after localization were rather different. Taking into consideration the time since their localization took place, as well as particular characteristics of each of their situation, that is nationality of participants, characteristics of each employer, country of localization, and so on, the participants in the United States seemed more integrated than those in Sweden. They largely deconstructed and reconstructed their social identity to accommodate their change of contract of employment, and long-term stay in their countries of residence. In

contrast, the participants in Sweden did not seem to have engaged as much in the process of social identity reconstruction. In most parts, they have remained detached from the Swedish culture, in part because of their inability to speak Swedish. They have also not fully integrated to local work groups. At the same time, they may have declined their frequent contact the community of expatriates.

CHAPTER V

INTERPRETATION, CONCLUSIONS, RECOMMENDATIONS

The purpose of this study was to explore an emerging international HR trend – the localization of expatriate employees. More specifically, this study aimed at understanding the experiences of expatriates in becoming local employees in multinational organizations located in Sweden and the United States. This chapter is organized into three sections: 1) the interpretations of the findings, 2) conclusions, 3) and recommendations for practice and research.

INTERPRETATION OF FINDINGS

The comparison of each individual/single case study of how participants lived and interpreted the transfer from expatriate to local contracts at multinational organizations in Sweden and the United States yielded the following three interpretations. The proposed interpretations aimed at responding the research question in this study regarding to career transition and social identity.

1) The transferring from expatriate to local contract is a major transition in the lives of the interviewed expatriate employees, which causes them to significantly alter their behaviors and relationships. In the cases study, most localizing transitions were either unanticipated or nonevent transfer. The participants did not expect to transfer to a local contract overseas; rather they expected to either return to their home organizations or to transfer to a subsequent expatriate appointment at another international

location of their firms. The transition often presented elements of crises. It did not allow employees enough time to prepare for them.

2) The manner in which participants navigated the transition was significantly impacted by three factors: (a) the situation in which the transition occurred; (b) the individual characteristics of participants; and (c) the support available to navigate the transition. The success of the transition was therefore resulting of the resources available before, during, and after the transition took place.
3) The transition from expatriate to local contract also led to employees to alter their social identities. It caused participants to change the way they perceived themselves and the way they responded to that particular transition in their lives. They re-categorized their views of self; this resulted from changes to their membership to social groups, and/or the perception of similarities or common stories to other people in their professional and social life.

Unanticipated and nonevent transition. In my study, most participants did not expect to transfer to a local contract with their host organizations overseas. In most cases, localization had never been presented as a possible outcome upon the termination of the expatriate contract. Rather, it was often presented in very negative terms, as in the case of George whose boss discouraged him to even consider transferring from expatriate to local contract. In most cases, participants did expect to return to their organizations. Most of them also expected to receive a job promotion upon their

repatriation to their home countries/home organizations. In the majority of the narratives provided by the participants, the transfer to local contract had happened because of unforeseen reasons –i.e. lack of job position at employee's home organization or elsewhere; lack of job position for the spouse; changes on the global mobility policy of their organizations, and so on. In most cases, the transfer from expatriate to local contract was a default solution to a situation where no other viable option was available.

Schlossberg (1981) defined transition as "any event or non-event that results in changed relationships, routines, assumptions, and roles" (p. 43). According to Schlossberg, any transition has both positive and negative elements depending on the balance of resources and deficits that individuals may access to deal with them. Most transitions require individuals to alter their behaviors, which often result in confusion, anxiety, and frustration (Goodman et al., 2006). Further, each transition varies based on its type, context, and impact (Schlossberg et al., 1995). These authors suggested three types of transition: (a). anticipated; (b). unanticipated; and (c). nonevent. Unanticipated transitions are triggered by unplanned and surprising events that often do not allow individuals time to prepare. People who do not expect a set of changes tend to have more difficulty in adjusting to and coping with the transition (Goodman et al., 2006). Hence, unanticipated transitions are more likely to become crises than anticipated or normative transitions (Schlossberger, 1981). Nonevent transitions, such as not repatriating to home countries/home organizations and not receiving a job promotion, have the potential to significantly change the way individuals see themselves, and the way they respond to the lack of that particular transition (Goodman et al., 2006). Considering that most

participants in my study expected to receive a job promotion upon their repatriation or continued expatriation elsewhere, the transfer from expatriate to local, in most cases, had elements of both unanticipated and nonevent transitions. Hence, the impact on the lives of the study participants caused moments of aggravated confusion, anxiety, and frustration. In most cases, it became both a professional and personal moment of crises to the participants and their families. In addition, the transition from expatriate to local contract resulted in a significant rupture and change to the way participants perceived their identities and responded to that particular transition.

In the current study, most participants embarked on the expatriate assignment with the purpose of technical development. Both in Sweden and the United States, most participants transferred internationally to either further develop in their areas of expertise, or to share with others the particular skills and knowledge they possessed and were missing at the international location. There was an immediate assumption made by the participants that they would progress to better career opportunities upon the termination of their expatriate assignments. The high salaries and benefits they received also made these expatriates believe that they had joined a superior group of employees in the organization. As most participants described, they had reasons to believe that they would move on to further career opportunities. This understanding reflects a view that expatriation has become a necessary stepping-stone for development of leadership in global organizations (Black, Gregersen, et al., 1999; Caligiuri, 2006; Suutari & Makela, 2007). Among international firms, there is an increasing demand for business leaders with both global knowledge and skills to operate in an integrated global business

environment (Black, Morrison, et al., 1999; Caligiuri, 2006; Caligiuri & Di Santo, 2001; Gregersen et al., 1998; Oddou et al., 2000). Hence, most participants assumed that their organizations would utilize their newly acquired knowledge and skills, promoting them to more challenging career positions.

Most participants in this study did not actively pursue their transfer to a local contract. Among participants in Sweden, three described their transfer as employee-initiated; one as company-initiated. Among participants in the United States, all described their transfer as company-initiated. At a closer look, however, all participants in Sweden described that their localization resulted from lack of career positions at their home organizations or elsewhere. The offer of a local contract came, in most cases, shortly before the termination of the expatriate contract. Up to that point, most participants had been actively searching or negotiating a possible transfer to another global location of their firms. Among all participants in Sweden, the transfer to a local contract had acute elements of crises, with participants not knowing what would happen to their careers upon the termination of the expatriate assignment. Olga, for instance, did not know if her new boss had any intention of offering her a local contract until about two months prior to the termination of the expatriate contract. Ernesto and Paolo aimed at returning to their home organizations but were unable to find acceptable job positions. George was certain that he would be offered another expatriate contract at a different global location of Company A. Therefore, his transfer to a local contract was unexpected; his contract negotiation was plagued by moments of great uncertainty and stress.

Among participants in the United States, the transfer to local contract was, in some cases, unexpected but it did not present serious elements of crises. To begin with, most participants were relatively content with their long-term stay in the United States although they did not actively pursue their localization. Gustavo and Rosa, employed at Company B USA, would have preferred to move to another international location of their firm but were pleased with their localization at the geographical center of business of their industry (oil). Ronaldo transferred to local contract only after 1.5 years in the United States. He had understood that his expatriate contract would last longer (up to five years).

He localized in Mexico; his transfer was plagued by many challenges. However, he was presented with a great career opportunity, managing the HR sector of one of largest facility of his employer worldwide. He was certain that the job position would yield great future career opportunities. Pedro, an expatriate employee for nine years, did expect his eventual transfer to a local contract. He is the only participant to whom the transfer from expatriate to local contract was not unanticipated.

In summary, the transfer from expatriate to local contract, given its unanticipated and/or nonevent transition characteristic, presented various elements of crises. Most participants, with the exception of Pedro, did not have time to prepare for them. Most participants never understood the transfer to a local contract as a possible outcome upon termination of the expatriate contract. Rather, they expected some form of career promotion to take place. As localization is a relatively new practice increasingly adopted by multinational organizations, most companies are still sorting out policies and

procedures to handle the transfer of employees from expatriate to local contracts (Bosson, 2010; Hauser, 2003; Joinson, 2002). The lack of established procedures and clear policies with regards to the handling of expatriate employees created an environment of great confusion and anxiety, as was the case of participants in Sweden. Among all participants in this study, their narratives of localization were characterized by moments of confusion, anxiety, and frustration. As evidenced also by my observations, particularly in Sweden, this chaotic environment drove many expatriate employees to leave their organizations prior to the termination of their expatriate contracts. They did not know what the future would entail for their careers. They feared being offered a local contract as the only employment possibility upon the end of their expatriate contract. As evidenced by the literature on career development, the relationship between employers and employees is intermediated by a set of unwritten rules of reciprocal and promised obligations, known as psychological contracts (Argyris, 1960; Schein, 1965). Any perceived rupture of this contract often leads to feelings of resentment, dissatisfaction, and turnover intention among employees. As observed among repatriate employees, turnover intentions often follow when employees feel that their companies did not fulfill the promises and perceived obligations made to them (Lazarova & Caligiuri, 2001). Based on my observations in Sweden, turnover of employees occurred even prior to the termination of expatriate contracts. In the United States, there was also a significant turnover of localized employees, with three out of four participants of this study leaving their organizations shortly after their transfer to a local contract.

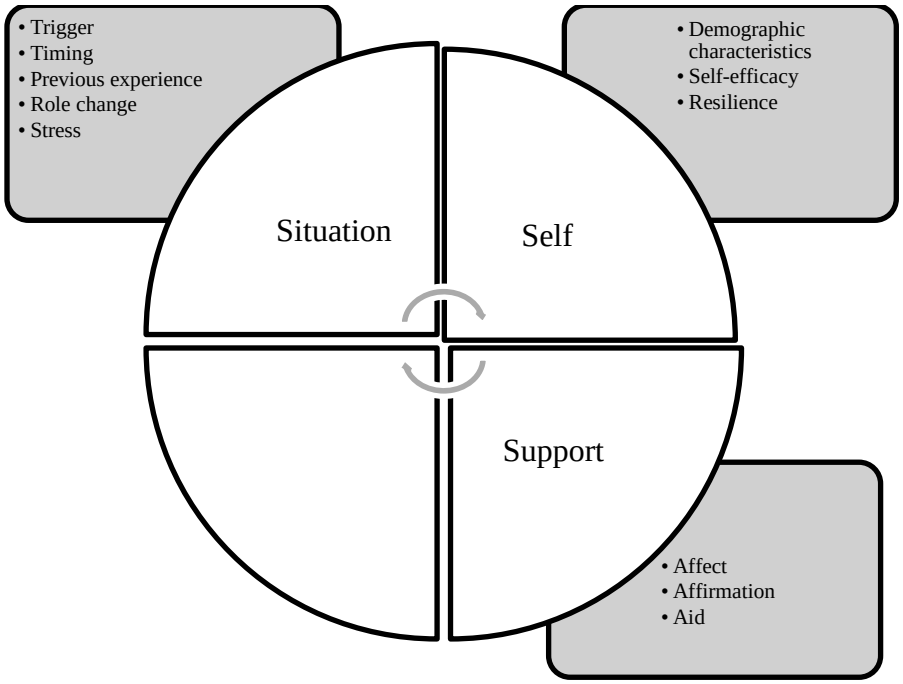
The literature on expatriation has addressed various aspects of the international transfer, in particular selection procedures (Tung, 1981), issues of adjustment (Brewster, 1999; Shaffer et al., 1999) and training (Black & Mendenhall, 1990). Repatriation, or the once traditional termination of the cycle of expatriation, is still an under-researched topic (Nery-Kjerfve & McLean, 2012); and no empirical information is yet available on issues related to localization of expatriates. At this point, it is still unclear about a connection between expatriation and career development (Feldman & Tompson, 1992; Harvey, 1989). Mendenhall, Dunbar, and Oddou (1987) found that international assignments are often poorly managed by MNCS. Most companies often fail to coordinate efforts to utilize employees' knowledge and to advance and promote employees (Mendenhall et al., 1987; Nery-Kjerfve & McLean, 2012). The literature on expatriation has also addressed issues related to employees' expectations regarding work and non-work lives after repatriation and turnover intentions (Jassawalla & Sashittal, 2009; Lazarova & Caligiuri, 2001; Vidal et al., 2007). It was identified a connection between organizational commitment during expatriation and job satisfaction and retention among expatriates (Lazarova & Caligiuri, 2001; Vidal et al., 2007). In contrast, high turnover often results from repatriation, with an estimated 20% to 50% of employees leaving their organizations within one year of returning from international assignments (Baruch & Altman, 2002; Stroh et al., 2000).

This study identified a significant turnover of employees upon transferring to local contracts. Overall, 37.5% of participants (three out of eight) left their companies within the first year of their localization. Further, the remaining participants (e.g., Olga

and Paolo) also indicated an intention to leave their employers. Among the participants in the United States, only one remained with his organization. Hence, when evaluating the turnover of employees only among U.S. participants, it was even more significant - 75%. Among the participants in Sweden, the lack of language-ability made it more difficult for them to find employment at other organizations in Sweden. Hence, turnover was less prevalent among employees who chose to remain at Company A Sweden. On the other hand, through my observations, I was able to note that there was a significant turnover among expatriates, even before repatriating or transferring to a local contract. Feelings of uncertainty existing during the months prior to the termination of expatriate contracts drove many employees to leave Company A. Many employees found job positions at companies either in their home countries or elsewhere. Very likely, Company A did not keep track of the reasons that precipitated the departure of these employees. Hence, the turnover of expatriates prior to the termination of contracts may very well be a lost data/statistics for HR professionals and companies, and bear evidence of how haphazard and ill planned the management of expatriates is in most corporations (Mendenhall et al., 1987).

Situation, self, and support. Goodman et al. (2006) posited that four variables often impact the manner in which adults are able to navigate any transition in their lives. The variables were labeled the "4S" of transition –situation, self, support, and strategies. In this section, I explored how the narratives of transferring from expatriate to local contract were impacted by three of the four variables identified by Goodman et al.: situation, self, and support (see figure 1).

Figure 1: The 4S model adapted to 3S model



Situation

This variable refers to the particular characteristic of the transition, as impacted by eight situational factors: trigger, timing, control, role change, duration, previous experience, concurrent stress, and assessment (Goodman et al., 2006). Below, I explored a few situational factors that were addressed by my study participants. They are triggers, timing, control, role change, previous experience, and stress.

In my study, most transitions were described by the participants as triggered by a combination of external and internal factors. After a close examination of the expatriates' narratives, however, it became clear that external factors were more prevalent than internal ones in determining most transitions. Lack of job positions at home organizations or elsewhere; sudden change in the global mobility policy of

employers; transfer to another subsidiary of the firm; lack of positions for spouses were all external factors that influenced the participants' experience of localization, including George, Ernesto, Paolo, Rosa, Gustavo, Ronaldo, and Olga to some degree. In several cases (e.g., Olga, Ernesto, Paolo, Pedro, and Ronaldo), internal factors also played a part in participants' experience with transitions –i.e. desire to stay at overseas location for family's reasons; and desire to take a job position deemed interesting. In four cases (Ernesto, Olga, Paolo, and Rosa), there was a combination of both external and internal triggers.

In terms of timing, most participants localized at the end of full term termination of their expatriate contracts, except Ronaldo (before), and Olga and Pedro (after). The range of duration of participants' expatriate contract was 1.5 years to 9 years, with a median of 4.5 years. For some participants such as Pedro, Rosa, and Gustavo, they felt relatively at home at the overseas location, at the time of their transferring to a local contract. However, for others, such as Ernesto, George, Olga, Paolo, and Ronaldo, the timing was deemed relatively soon, as most of them were contemplating a return to their home organizations or a move elsewhere.

In terms of control, most participants described a limited personal control over the transitional events related to their localization. In most cases, they aimed at returning to their home organizations; their contract of employment often stated a promise of repatriation to their home organizations in a similar position. The participants, however, did not control the access to the positions at home or elsewhere. In most cases, the locus of control resided with their employers, both in cases where the transfer to a local

contract was company-initiated and employee-initiated. Upon closer examination of the narratives, most participants, except Pedro, described that their transfer to a local contract was either a default solution to a situation where there were not any other viable option, or to follow the need of the organization.

In terms of role change, half of the participants remained in their job positions; the other half took on another job position upon localization. Goodman et al. (2006) posited that a role change can be more or less challenging "depending on whether the new role is a loss or a gain, is positive or negative, or has explicit norms and expectations for the new incumbent" (p. 63). For the participants who did experience a role change (Paolo, Pedro, Gustavo, and Ronaldo), the new job positions were either a job promotion and/or a great career opportunity. Paolo, for instance, joined another section of the firm. Although the new position presented various challenges, he was excited to learn about another side of the business. Ronaldo had a relatively traumatic transition to a local contract; he localized after only 1.5 years on an expatriate contract, was transferred to another geographical location of the world (Mexico), had unusual living arrangements with his family initially being away and later residing across the border in Texas. Nevertheless, the job position was perceived by Ronaldo as a gain, because he firmly believed it would yield great learning and possible career opportunities in the future. In the narrative of participants, a role change was presented as positive; this was possibly resulting from the fact that most participants assumed that a job change and promotion would follow the termination of their expatriate contracts.

In terms of previous experience, two participants had previous experience with transfer from expatriate to local contract –Olga and Gustavo. Most participants, however, had never heard of the possibility of transferring to a local contract upon the termination of their expatriate contracts. In addition, they did not know anyone else who had gone through localization; neither did they know any literature information on the topic. Further, given the particular characteristics of localization –i.e. unanticipated/nonevent transfer-, this particular transition was very different from any other previous career transition in the lives of employees. The lack of previous experience made the transition more difficult than any other previous transition (Goodman et al., 2006). It was also a transition plagued with higher level of stress considering the novelty of the practice of localization, the lack of established procedures and policies, and the unanticipated/nonevent characteristic of the transition.

Self

This variable refers to individual characteristics of the person experiencing the transition (Goodman et al., 2006). In general, people have both positive and negative characteristics that may assist or hinder the manner in which they are able to manage the transition. Goodman et al. (2006) posit that any form of transition is greatly influenced by five particular characteristics of individuals -personal and demographic characteristics; psychological resources; optimism and self-efficacy; values; spirituality; and resilience. In this section, I addressed individual characteristics of participants as evidenced by their narratives.

Coincidently, all participants in this study belonged roughly to the same age group; their ages were between 39 to 50 years old. They had reached a level of both personal and professional maturity that allowed them to navigate relatively well the transition to localization. In addition, all participants had a similar socio-economic status. They had been employed in good job positions –i.e. professional, manager, and director-, with generous salary benefits, at large multinational organizations. Further, all participants displayed high levels of self-efficacy. They had been proactive throughout their careers. Below are a few highlights of their proactive behaviors: (a). engaging in further training and graduate education (i.e. George, Paolo, Olga and Rosa; (b). looking for better career opportunities in their organizations or elsewhere (i.e. George, Paolo, Ernesto, Rosa, Pedro, Ronaldo and Gustavo); and (c). making sure their work was visible and positioning themselves for career promotions (i.e. Gustavo, George, and Paolo). At the time of localization, and in the absence of extensive support services provided by their organizations, most participants took upon themselves the handling of various aspects of the transition to localization. Few participants (i.e. Ernesto and Olga) ultimately believed it was their responsibility to handle the transition, although they had wished for more corporate support.

Among the eight participants, six were males and two were females. All of them participants displayed similar behaviors of self-efficacy. Female expatriates however dealt with more challenging circumstances. Most male participants had non-working spouses who, in most cases, served as a resource during the transition to expatriation and later localization. The two female participants had working spouses with demanding

professional careers and employed at the same organization. They also had infant children and a very busy family life. Hence, female participants displayed even higher levels of self-efficacy, considering that they were presented with more challenging circumstances.

All participants also displayed high levels of resiliency. As a matter of fact, resilience was the most striking individual characteristics displayed by participants in this study. Since the beginning of their international careers, most participants dealt with numerous uncertainties related to various aspects of their expatriate contracts, such as confusing employment contracts and lack of services available at new organization. They often operated in an environment lacking clear rules, while dealing with the usual issues that occur when moving overseas –i.e. figuring out new cultural environment; learning to work in a new international corporate culture; assisting the family in adapting to new country/culture. In some cases, challenges were more severe, as in the case of Paolo, Rosa, Gustavo, Olga, and George. Paolo's unusual expatriate contract created a situation where he was unable to work effectively during his initial months in Sweden. Gustavo and Rosa were hired on a temporary contract of employment, while their organizations waited to launch full operations in Brazil. For the initial months, they worked under great uncertainties until their eventual expatriate transfer to the United States. Olga arrived in Sweden with an infant child; she did not have access to childcare services during her first months in Sweden. George, in particular, dealt with a very confusing situation upon joining Company A Sweden; he accumulated two job positions, while commuting between Sweden and the United Kingdom where his family resided.

At the time of localization, most participants dealt with heightened uncertainties, as described in Chapter 4. Hence, resiliency was a recurrent characteristic found among all participants in this study. This was an important individual characteristic that made possible for this group of participants to accept and to manage well their transfer from expatriate to local contracts, while others, non-participants in this study that I had the opportunity to observe in Sweden, did not accept the transfer and left their organizations.

Support

This variable refers primarily to the existence and amount of social support networks available to assist individuals during transition (Schlossberg et al., 1995). Goodman et al. (2006) posit that three types of support mark any transition: affect (feelings, respect, love, admiration); affirmation (referring to expressions of agreement); and aid, which includes "exchange of things, money, information, time, and entitlements" (p. 76). Following this classification, the experiences of participants depict the transition from expatriate to local contract as a type of transition characterized by low levels of official (coming from employers) aid and affect support, but high levels of personal (coming from the family) affect support.

Most participants described a situation in which organizations did not provide extensive support. This was rather different from any other previous career transition experienced by participants, including their entry to the contract of expatriation. Upon localization, all employers discontinued HR support services (global mobility services) available at the time of expatriation, leaving participants with virtually no dedicated assistance to assist during the transition to local contract. Considering that the experience

of localization was a very private, almost invisible transition in the eyes of other colleagues in the organization, there was also a lack of affect support from colleagues. Most participants did not know of others going through localization at the same time, nor did they know of a repertoire of information –i.e. from colleagues' previous experiences, literature, etc., in regards of the transfer from expatriate to local contracts. This was a stark contrast to their experience of expatriation, where participants were immediately recognized by others as new members of the community of work and residence, and received both corporate aid support and affect support from colleagues. Further, several participants (Ernesto, George, Pedro, and Ronaldo) described the presence of a mentor who guided them during the initial months of expatriation. At the time of localization, no participant relied on the assistance of any mentor. There was simply no one in their organizations available to serve as mentors.

In addition, the experience of localization for participants, particularly in Sweden, lacked any type of formal or informal ritual marking the transfer from expatriate to local contract. As described in Chapter 4, most transfers happened in a very private manner, only involving the participant, his/her immediate family, HR department, and immediate boss. Although this de-ritualized aspect of localization, the transition was an event loaded with significant professional and personal rupture, as participants were relinquishing any ties to their home organizations and were agreeing to reside indefinitely outside of their home countries. If expatriation happened amid an environment of support and informal rituals of initiation and transition to the new life in the international community of work, the experience of localization happened, by most

parts, in a very private manner, with no recognition by others that a major change had happened in the lives of these employees.

Among participants in the United States, there were private rituals of transition from expatriate to local contract, particularly referring to the acquisition of permanent residency status and naturalization in United States. A few participants described this as a pivotal moment in their lives, which marked their understanding and acceptance of their long-term stay in the United States.

If official corporate aid and affect support were unavailable at the time of localization, most participants (Ernesto, Paolo, Olga, Ronaldo, Gustavo, and Rosa) described that they relied strongly on the affect support of their families. At the time of localization, most participants had either received a short-term continuity of benefits or a lump sum payment to ease the termination of benefits of the expatriate contract. All further assistance once received while on expatriate contract (i.e. services of relocation agencies; close contact with global mobility team of the firm; and so on) came to an immediate halt upon the transfer to a local contract. Most participants were relatively new to their host locations and did not feel greatly confident with various aspects of life in the international location. Various issues were still a great novelty to participants, including employment rules and regulations, accrued benefits and pensions, rules of buying property, and so on –this was particularly true for participants in Sweden. In most cases, life after localization was rather different from the time participants relied on the sheltering support provided while on an expatriate contract. As described by one participant, Paolo, while on expatriate contract most participants "lived in a bubble",

protected by extensive assistance from their organizations; at the time of localization, this “bubble exploded” and participants were “projected into real life”, with companies wrongly assuming that they were familiar with their surroundings (Paolo, second interview, p. 14).

Most participants described that the family unit became their most reliable source of support after localization. Particularly in the case of male employees, the spouses played a role of both the source of information and support. The spouses were in charge of figuring out most unknown factors related to the indefinite stay abroad. Ernesto, Paolo, and Gustavo described that their spouses assumed various responsibilities including figuring out health benefits, home purchase, and even helping their husbands negotiate with HR re transfer to local contract. The literature on expatriation has long addressed the important role played by the family in the success or failure of expatriate assignments (Bauer & Taylor, 2001; Cole, 2011; Lauring & Selmer, 2010; Shaffer & Harrison, 2001). Spousal adjustment problems are often suggested as reasons for failure of international assignments (Caligiuri, Hyland, Joshi, & Bross, 1998). There is no empirical evidence as of yet to the role played by spouses in the success or failure of repatriation or transfer to local contracts. As evidenced in this study, from both among the narratives of participants and my observation of expatriates in Sweden, spouses played a significant role in the decision-making process and success of transfer to local contracts. It seems that the supportive role played by spouses is even more important in localization as compared to expatriation, taking into consideration the lack of support services provided by most corporations during the transfer to local contracts. According

to my study participants, the experience of localization was markedly a private, family affair in the life of employees. The decision to remain abroad or not on a local contract greatly involved the family. The needs of the family strongly determined the acceptance or not of local contracts; family support was invaluable at the time of ultimate transfer to a local contract. Based on the narratives, the female spouses, in particular, played an important role in making sure that the pivotal experience of an indefinite transfer overseas did not negatively affect the family. Spouses' affect support was vital in a situation where there were limited or nonexistent corporate aid and affect support.

Social identity. Most participants experienced a change of either work or social groups upon transferring from expatriate to local contracts. Changes to the membership of work/social groups resulted in participants re-categorizing their views of self. Hence, the experience of localization was a pivotal transformative transition in the professional and personal lives of both the participants and their families.

The majority of narratives of participants indicated a limited change in regards of work groups, particularly among employees that remained in the same job position –i.e. Ernesto, Olga, and George. As the transition to local contracts was a quiet event, not often visible in the eyes of colleagues, most participants did not describe any significant social identity change resulting from their interactions with colleagues. Among participants in Sweden, the flat structure at Company A allowed for a less traumatic transfer to local contract, with no important consequence to any significant social passage and loss of social status among employees who localized. Among participants in the United States, although the transition was also invisible to the eyes of most

colleagues throughout the organization, the transfer to a local contract entailed the perception that the employees would not be granted the same career opportunities as expatriate employees –this was particularly true for participants such as Gustavo and Rosa who were employed at Company B USA. Further, there was also a perception of changes to social status, observed particularly among participants employed at Company B. Among participants that did take a different job position (i.e. Paolo, Pedro, Gustavo, and Ronaldo) there was an immediate change of work groups, which was not necessarily deemed as a negative event. The transfer to a local contract upon a job change allowed participants a "fresh start" and some form of excitement upon beginning a new stage of their careers on a new job position. It also resulted in participants changing their long-term outlook and priorities. For instance, Rosa, who left Company B and took on a position with a new organization shortly after her localization, developed a completely different outlook upon joining a different work group. She became more attuned to local issues rather than to global international issues as the majority of her colleagues had spent most of their lives working locally, and most have never worked abroad.

If the transfer to local contracts did not necessarily cause any major change of work groups, it did cause an important change of social groups, particularly among the participants in Sweden. Based on the narratives, the transfer to local contracts resulted in participants initiating a gradual process of abandoning their social interaction with groups of expatriates, which they met in various locations, for example, international school, international clubs, and private parties. One participant (Paolo) described that he felt that he no longer belonged to this group after his transfer to local contract. He was

only a foreigner in Sweden, and no longer an expatriate. He no longer shared similarities and common stories with people with whom he often socialized up to the transfer to local contract. There was a significant difference of income and lifestyle between expatriates and local employees; localized expatriates were very much aware of this considering that they had held those lucrative contracts not so long ago. In the case of most participants in Sweden, this change of social groups did not seem to have initiated more integration to local groups. As all participants did not speak Swedish their integration to social groups of local colleagues was more difficult. As evidenced in the narratives of participants, they weakened their membership to expatriate groups without integrating more deeply to local groups and society in general. Several participants (Ernesto, Paolo, and Olga) mentioned that they felt that full integration of foreigners in Sweden was rather difficult. Ernesto perceived that, at Company A Sweden, foreigners were not granted same career development opportunities as Swedish citizens. Paolo noted that he did not feel at home in Sweden because of his perception of veiled prejudice and lack of integration of foreigners in Sweden. Olga acknowledged that she was a private person who had limited contact with any particular social group. Hence, most participants in Sweden did experience significant changes to their social identity in part because of interacting with different social groups, which resulted from the transfer to local contracts.

Among participants in the United States, the transition to local contracts made them come to terms with their long-term permanence in the United States, thus evaluating issues related to integration to U.S. culture while maintaining alive various

aspects of their Brazilian heritage. Participants such as Rosa, Pedro, and Ronaldo described their trajectory of integration and absorbing of U.S. values of work, while striving to remain connected to the local Brazilian community in their respective places of residence –U.S. northeast, Florida, and Texas. Among U.S. participants, two (Gustavo and Rosa) were married to U.S. citizens and two (Pedro and Ronaldo) were married to Brazilian citizens. For the two participants who married Brazilian citizens, the narratives of intense interaction with the local Brazilian community were significant; both participants (Pedro and Ronaldo) interacted socially with more than six hundred families through Brazilian churches located in the U.S. northeast and Florida.

In summary, the transfer from expatriate to local contract is a pivotal transformative transition in the lives of employees, with acute consequences to their social identifies. Social identity is often associated with the "categorization of self as an occupant of a role, and the incorporation, into the self, of the meanings and expectations associated with that role and its performance" (Stets & Burke, 2000, p. 225). The transfer from expatriate to local contract, although not always resulting from a change of role and/or visible in the eyes of other colleagues, resulted in participants evaluating and reshaping their sense of self and identity. Social identity is also defined by categorization and membership of individuals in social groups with perceived or supposed similarities with one another (Tajfel, 1978; Tajfel & Tuner, 1979). Further, categorization in social groups result from the interaction and close proximity of individuals with similar stories, or who share a common fate (Campbell, 1958), or of knowing of others belonging to the same social group; this interaction, proximity, or only knowledge of others may lead to a

shared common identity and the adoption of attitudes and behaviors (Brewer & Gardner, 1996; Locksey et al., 1980). Membership in social groups significantly determines the manner individuals see themselves, hence it largely impact their level of self-concept. An individual's sense of self-concept is largely influenced by social identity, and by their membership and belonging to particular social categories.

Among the participants in this study, the level of isolation and integration to another community of individuals after the transfer to a local contract significantly influenced their sense of social identity. Among the participants in Sweden, the narratives were marked by more isolation from local groups because of language barriers, limited employment opportunities, veiled prejudice, and so on. Among the participants in the United States, the narratives were marked by more integration in part because of more extensive employment opportunities, better integration to local communities –of U.S. nationals and of Brazilian-Americans, and so on. In any event, to all my study participants, the transition to local contracts resulted in a remarkable moment of social identity evaluation and reshaping in the lives of participants.

INTEGRATION OF FOREIGNERS IN SWEDEN AND BRAZILIAN-AMERICANS

In this portion of the section of interpretation of findings, I address two important issues described by participants: (a) Integration of foreigners in Sweden, and (b) Brazilian-American community in the United States. These two issues significantly impacted the context in which the participants dealt and navigated their experiences of localization. Among participants in Sweden, integration of foreigners was by far the

most frequently mentioned aspect of the Swedish scenario; this factor significantly impacted the narrative of transfer from expatriate to local contracts in Sweden. Among participants in the United States, I did not anticipate interviewing only Brazilian nationals at the beginning of this study. Because of snowballing, it so occurred that all participants interviewed in the United States were of Brazilian nationality. Hence, it is important that I address both integration of foreigners and aspects of Brazilian community in the United States when interpreting the findings of this study.

Integration of foreigners in Sweden. Sweden is a country of 9.7 million people, with about 20% of the population being foreign-born or descendant of foreign-born immigrants (Statistic Sweden, 2015). Immigration in Sweden started roughly after the Second World War, with an active program of recruiting of foreign-labor. Initially, the immigrant groups coming to Sweden were from neighboring European countries –i.e. Finland, Germany, Greece, Italy, and the former Yugoslavia (Fredlund-Blomst, 2014). Since the 1970s, Sweden has embraced social policies of international protection and human rights, and labor emigration has been outpaced by humanitarian immigration. Since the early 1970s, and particularly in recent years, Sweden has received an influx of populations affected by social, religious, and political unrest in their countries –i.e. Chile, Poland, Turkey, and as of recently, Syria, Somalia, Iraq, Afghanistan, Serbia, and Eritrea (Bevelander & Pendakur, 2012; Fredlund-Blomst, 2014). Sweden has received a large portion of asylum seeking immigrants entering the European Union, above 13% in year 2012 (Fredlund-Blomst, 2014). The year 2013 has recorded a significant rise in immigration to Sweden, primarily for humanitarian purposes. Sweden's average of first

generation immigrant population for the year 2013 is of 15.9%, which is slightly larger than the average for Europe (9.8%) and Northern Europe (12.6%; United Nations, 2013).

In the economic sector, Sweden has faced, in recent years, both economic downturn and changes to its labor market (Fredlund-Blomst, 2014). More automation and efficiency caused severe changes to the labor market; the availability of traditional industrial jobs have decreased and consequently the economic integration of various groups of immigrants (Scott, 1999). The unemployment rate rose to 7.9% in 2015 (Sweden Statistics, 2015). Concomitantly, issues related to prejudice against Sweden's ever-growing immigrant population have grown. A study detected that immigrants of four major groups in Sweden (Africans, Arabs, Asians, Yugoslavs) perceived that Sweden was a racist country that discriminated against immigrants (Lange, 1995). Aggravated social tensions of recent years, for instance unrest and streets riots in major Swedish cities, fueled the growth of far-right anti-immigration political parties, with the Swedish Democrats party reaching 13% of votes in the 2014 general election (Crouch, 2014).

Further, economic inequality has risen in Sweden, particularly among the immigrant population versus native Swedes. Higher unemployment rates and low economic integration of immigrant populations have grown since 2006 (Bevelander & Pendakur, 2012). Few studies have tried to explain this situation, asserting that differences in educational attainment, language barriers, rapid influx of refugees are the reason for low economic integration of immigrants in Sweden (Bevelander & Pendakur, 2012 Roth, 1999; Scott, 1999). Among all immigrant groups, economic integration is

lower than among native Swedes. As stated by Bevelander and Pendakur (2012), "The general pattern is that natives have the highest employment rate, followed by Europeans, and thereafter non-Europeans" (p. 205). Albeit this scenario, a study has identified Sweden as a top country with best policies to integrate its foreign-born population (Hyslop, 2011).

Brazilians in the United States. As of 2013, it was estimated that about 2.8 million Brazilians live outside of Brazil (Ministério das Relações Exteriores, 2015). A large majority of the Brazilian diaspora lives in the United States (about 1 million), followed by Paraguay, Japan, and Portugal. Most Brazilians in the United States reside around particular geographical areas –i.e. Massachusetts (22.5%), Florida (20.3%), New Jersey (10.4%), California (8.7%), New York (7.1%), Connecticut (5.1%), Georgia (4.1%), and Texas (2.7%) (Menino, 2009). Brazilian immigration to the United States is a relatively recent event, with a large majority of Brazilians arriving since the 1980s, primarily looking for better economic opportunities and better living conditions (Margolis, 2008). The Brazilian community in the United States is rather different from other immigrant communities. In average, they are more likely to have a good command of the English language; higher educational attainment, including Bachelor's degrees; higher participation in labor force, including among Brazilian immigrant women; lower unemployment rate, even lower than U.S. native population; higher income earnings; and less poverty rates (Lima & Siqueira, 2007).

The Brazilian community in the United States is rather vibrant and engaged, with various civic and religious organizations existing throughout the country –i.e. Brazilian

churches; Women's Groups, Immigrant Centers. In addition, various Portuguese-language publications are printed daily targeting specifically the Brazilian immigrants in the United States. As an example, in the Boston area alone, fourteen newspapers with weekly circulation of 20,000 issues, and nine monthly magazines with circulation of 12,000 issues are printed regularly (Menino, 2009). Further, three Brazilian TV channels transmit daily from Brazil and are geared specifically to the Brazilian community in the United States.

In terms of ethnicity and self-identity, Brazilians in the United States tend to see themselves as non-Hispanics; 90% of respondents of 1990 U.S. census choose to identify themselves as non-Hispanics (Marrow, 2003). As a group, Brazilians often attempt to establish an independent cultural identity different from other Latin American immigrants in the United States (Margolis, 2008). They are also successful in establishing transnational identities, meaning they keep a strong connection to their homeland while working and residing abroad; thus allowing for a constant flux of influences and of absorbing of behaviors from these two cultural backgrounds (Margolis, 2008).

CONCLUSIONS

The purpose of this study was to explore the emerging international HR trend of transferring employees from expatriate to local contracts in multinational organizations. As recent international employment surveys have revealed, this is a growing trend among organizations (Brookfield Global Relocation Services, 2012; Cartus, 2010), which is likely to increase as companies strive to curb the costs of handling their global

mobile cadre of international employees (Bosson, 2010; Hauser, 2003). As of yet, no empirical evidence is available addressing the impact of this career and life transition on the life of expatriate employees. This study aimed to contribute by addressing this gap in the literature. The findings of this study yielded three interpretations, which posit that localization is a major career and life transition in the life of expatriates and their families that forces employees to significantly alter their behaviors and relationships. Considering the unanticipated characteristics of this transition, the transfer from expatriate to local contract is significantly different from most career and life transitions ever experienced by individuals; they often occur amid an environment characterized by strong elements of crises –i.e. uncertainty, stress, and isolation. As companies are still in the process of developing policies and practices of localization, the transfer to local contract is often an ill-planned, haphazard event that leaves employees without much support from their employers, mentors, and local colleagues. Because of the dearth of information and/or a repertoire of knowledge existing regarding localization, most employees are faced with limited or no resources available to navigate this transition. Hence, localization becomes a very private type of transition, in which employees may only rely on the assistance of their families, particularly spouses. The experience of employees transferring to local contracts is significantly impacted by various factors as revealed by this study. They are directly associated with the resources and support available to handle the transition, more specifically: (a) type of situation in which it occurred; (b) individual characteristics of participants; and (c) availability of support to navigate the transition.

Most participants in this study transferred to a local contract because of inexistence of any other available job positions in their home organizations or elsewhere; their localization was a default solution to a situation in which there were no acceptable job positions available. This is an indication that career planning post expatriation was done in an unplanned and non-strategic manner, not allowing participants' knowledge and skills to be better utilized by their organizations. It is also an indication that their employers failed to deliver what was stated in most expatriate contracts, as a few participants in this study had signed contracts that clearly stated an obligation of their home organizations to find an equivalent or similar position upon the termination of the expatriate contract. Conversely, several study participants assumed that they would be offered a subsequent expatriate contract at another global location of their firms. Although this had not been clearly stated in any contract, there was a strong indication that another expatriate contract would follow; their localization had happened because of unforeseen circumstances, mostly related to needs of firms to retain the participants' talent and skills. There were also cases of localization in which expatriate contracts had been utilized to attract the employee to the organization, but in these cases, there no plans for further career development elsewhere at the termination of the expatriate contract. In any event, most participants did not understand that a transfer to a local contract might take place upon the termination of their expatriate contracts. This was never either proposed or discussed by their organizations; consequently, a transfer to local contract had never come to anyone's mind as a possible outcome of expatriation. Considering this situation, issues of trust and ethical behavior may very well be

questioned in regards of the behavior of firms when transferring employees to local contracts without any previous warning that this was a potential career path to come upon the termination of expatriate contracts. As evidenced in this study, this transition had major consequences to the professional and personal lives of most participants. This may be seen as a failure of organizations in adopting an ethical behavior in handling their international staff. They seemed to have failed in treating their employees with care and respect, and did not succeed in designing a well-thought program for the handling of expatriates, from the preparation phase of expatriation through the termination phase of either repatriation or localization. Additionally, as revealed in this study, localization did result in turnover of employees, both prior to the termination of expatriate contracts (as evidenced in my observations in Sweden) or after the transfer to a local contract (as evidenced for the participants in the United States). Therefore, a well thought career plan must follow to make sure organizations are able to retain these high valued employees.

RECOMMENDATIONS FOR RESEARCH

Considering the dearth of empirical studies on localization and the impact of transfer from expatriate to local contracts in the lives of employees, it is necessary that more studies be conducted in order to build a better understanding of this phenomenon. Future studies may focus on different international locations, different employers, and of different industries, as well as expatriates of different cultural backgrounds could help build a wider understanding of the phenomenon of localization. This study is limited because of its scope. It concentrated primarily on two international locations –Sweden and the United States. Considering its high standards of living and socio-economic

opportunities, both locations present only limited challenges to localization and immigration. In addition, the United States is the number one country where localization takes place (Bosson, 2010). Further studies may need to investigate localization in different parts of the world, with more challenging circumstances (social, economic, and political) and with different salary compensation structure. This study was also limited because it involved participants employed in four organizations of four different industries (packaging, oilfield, automotive parts, and metals). Further studies may need to involve other industries and other organizations in order to expand the knowledge on localization. This study adopted case study as its research design. It may be important that further studies adopt different research designs, with the objective of investigating the topic through different lens and approaches.

Furthermore, considering that global organizations are increasingly readjusting their expatriate policies as a cost-saving strategy (Bosson, 2010; Hauser, 2003; Joinson, 2002), it is important that further studies examine the initial impact of these changes on the life of employees, as well as its impact on the day-to-day activities within organizations. As suggested in this study, the context played a significant role in the shaping of participants' experiences of transferring from expatriate to local contract. Hence, it is important that further studies be situated in different contexts in order to advance our knowledge regarding localization of expatriates.

RECOMMENDATIONS FOR PRACTICE

This study is likely to be one of the first investigations of the experiences of employees in transferring from expatriate to local contracts in multinational

organizations. Several recommendations are advanced here, taking in consideration however the scope and limitations of this study. First and foremost, it is necessary that MNCs develop a clear strategy for handling of international assignments, which includes communicating clearly to employees about their career path after expatriation. It is recommended that transfers to local contracts do not occur in an environment marked by unanticipated or nonevent characteristics. Employees need to become aware that a transfer to local contract is a possible outcome to follow after the termination of expatriate contracts. In addition, a more robust support system needs to be in place to assist employees during their transfer to local contracts. As found out from this study, most transfers occurred in an environment characterized by high levels of uncertainty. This makes it even more important for MNCs to create mechanisms to extend some form of support, similar to the type of organization support provided during expatriation, to assist employees in the early months after transfer to local contract. Furthermore, considering the inexistence of information on transfer to local contracts, MNCs should also try to create materials some written materials (e.g. booklets, newsletter) that could provide much needed information about localization. Companies should also strive to pair employees who have gone through this transition with others who are considering and/or experiencing the transfer. These employees would serve as mentors to newly localized expatriates, thus helping to lessen some elements of crises often associated to this transition, such as uncertainty, stress, and isolation- often associated with this transition. At the time of expatriation, many participants acknowledged the valuable assistance offered by their mentors, which was perceived as more important than most

training that they had ever received. The assistance of a mentor, at the time of localization, has the potential of facilitating the transitional process; this is also an easy deployable and extremely cost saving tool to be used by MNCs. In summary, in order to retain these valuable employees MNCS need to provide some form of support during the transition period from expatriate to local contract. As documented in the literature on repatriation, there seems to be a connection between organizational commitment during expatriation and job satisfaction and retention among expatriates (Lazarova & Caligiuri, 2001; Vidal et al., 2007). The very same may be also true for employees going through transfer to local contracts; organization commitment and support may help reduce the high turnover of employees identified in this study.

For employees embarking on international assignments, it is important to be educate themselves about new trends of international employment increasingly adopted by global organizations. It is recommended to employees to request from their employers firm guidelines regarding a career path to follow after the termination of their international assignment. It is also suggested to employees to keep close contacts with line managers and HR departments of their firms, both with host and home organizations HR's department to make sure their assignment is handled properly, and

REFLECTIONS

I used this section of the dissertation to explore and reflect on my trajectory as a researcher during the process of researching and writing this dissertation. This was a very long process, initiated about 6.5 years ago when I joined the HRD Ph.D. program at Texas A & M University. During this time, I have had my share of pivotal life

transitions; I became an expatriate myself, and moved to two countries (Sweden and United Arab Emirates) while trying to finish coursework, interviewing participants, and finishing writing this dissertation. I also dealt with many new challenges resulting from moving to international locations with children at 6 and 15 years old when I initially went abroad. I also dealt with many changes that took place at my academic department at Texas A & M University. My advisor and mentor of my initial years left the university; other faculty also left the department, creating an environment of much stress for everyone –faculty and students alike. It has been an extremely great challenge to carry on this dissertation project mostly as a distance student. At various moments during this trajectory, I felt I would not manage to complete this project. By most parts, I worked in isolation, with very little contact with fellow graduate students and my new advisor. I reached the finish line of this project with a great sense of accomplishment. Despite the numerous challenges, I completed my graduate studies at Texas A & M with one dissertation, three peer-reviewed first authored journal publications, and five peer-reviewed first authored conference presentations with proceedings. In my personal life, my family has survived and thrived during these exciting yet challenging years of expatriation. Keeping normalcy amid constant change has been a necessary priority of mine during these past 4.5 years of living outside the United States.

As mentioned earlier, the topic of this dissertation resulted from my interaction in Sweden with expatriates who were offered and/or accepted the transfer from expatriate to local contracts. Up to that point, I had never heard of employees transferring to local contracts at host organizations. Coincidentally, I had just finished a project, which

resulted in a journal publication on the topic of repatriation of expatriate employees. I was largely under the impression that all expatriate employees either repatriated to their home countries/home organizations or moved on to subsequent expatriate appointments at another international location of their firms. Upon observing this trend in Sweden, I became extremely curious and did some preliminary research on the topic of localization of expatriates. I came across a significant dearth of empirical research on the topic, and the information that this trend of employment was likely to continue because of its cost saving potential. My experience in Sweden in dealing with expatriates on the verge of transferring to local contracts unveiled a situation characterized by intense stress and much uncertainty. The limited literature on localization did not address the experience of employees going through this particular career transition. Hence, I became intrigued and decided to select this as a topic of my dissertation.

The opportunity of living in Sweden as an expatriate afforded me a great vantage point in observing the turmoil that an upcoming localization was causing in the lives of employees. I learned their stories even before I decided to study this topic. At the mid-size expatriate community in Sweden, where Company A was the largest employer, the conversation at most social gathering always gravitated to issues referring to expatriation –i.e. adjusting to life and work in Sweden; school issues faced by children and parents; exchange of information on services; changes in the mobility policy of companies, etc. At the time when Company A decided on implementing localization, many individuals spoke openly about these upcoming changes, and shared much information. As I attended a few expatriate gatherings in Sweden, I somewhat became a participant

observer in these social environments where expatriate employees felt more at ease to share their particular stories, doubts, and dilemmas. I was able to include this information in my field notes, without breaching any confidential information regarding the people that I observed.

As I was living in Sweden as an expatriate, while my husband served on a diplomatic appointment, I myself was dealing with the challenges associated with adjusting to life in Sweden. I did develop my own ideas and biases about the country based on my personal experiences. I have kept a reflective journal, and have thoroughly recorded and reflected on my experiences in order for them not to greatly influence the analysis of findings of this dissertation. Given that I am the main instrument of research in this qualitative project, my personal experiences as an expatriate in Sweden may have impacted my analysis in this project. Nonetheless, these same experiences possibly allowed for a deeper understanding of issues faced by expatriates in Sweden. I definitely could draw a better understanding of the narratives of participants because of my long-term permanence in Sweden and my own experiences as an expatriate.

Similarly, I had a great vantage point when interacting with participants in the United States. I did not initially anticipate interviewing only participants of Brazilian nationality; because of snowballing, the sample of participants in the United States ended up being composed of only Brazilian nationals and/or Brazilian-American nationals. I share in common with them the same cultural identity, of being a Brazilian-born American citizen residing in the United States for the past two decades. This allowed for an easier interaction with participants, and a greater understating of their

narratives. At the same time, it may have influenced my analysis of the findings in this study, which I tried to keep under control by keeping a reflexive journal.

I believe that my own experiences as an expatriate allowed both greater insight and more understating and compassion in regards of the experiences of employees transferring from expatriate to local contracts. My long-term engagement with the community in Sweden also allowed for a better appreciation for the impact of localization in the personal lives of employees. I was able to observe that a few people who have gone through this transition suffered a tremendous impact on their private lives –i.e. estrangement from spouses and divorce. The sudden reduction of income, in an environment where most transfers to local contracts were unanticipated and not necessarily desired, created numerous challenges to many employees and their families. This vantage point enabled me to record these challenges and outcomes, which otherwise would have been not possible to observe in a typical short research engagement with participants and expatriate community at large.

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APPENDIX A

DIVISION OF RESEARCH

Office of Research Compliance and Biosafety

TEXAS A&M UNIVERSITY

APPROVAL DATE: 06/03/2013

MEMORANDUM

TO: Jia Wang
TAMU - College Of Education - Educational Adm & Human Resource Develop

FROM: Dr. James Fluckey
Chair
Institutional Review Board

SUBJECT: Submission Response for Initial Review Submission Form Approval

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Protocol Number: IRB2013-0348

Title: Staying local: A multiple case study of employees moving from expatriate to local contracts at two multinational organizations

Review Type: Expedite

Approved: **06/03/2013**

Continuing Review Due: 04/30/2014

Expiration Date: 05/31/2014

Documents Reviewed and Approved: IRB Application; Consent Form; Interview Questions; Recruitment email and phone script

Document of Consent: Written consent in accordance with 45 CF 46.116/ 21 CFR 50.27

This research project has been approved. As principal investigator, you assume the following responsibilities

1. **Continuing Review:** The protocol must be renewed by the expiration date in order to continue with the research project. A Continuing Review application along

with required documents must be submitted by the continuing review deadline. Failure to do so may result in processing delays, study termination, and/or loss of funding.

2. **Completion Report:** Upon completion of the research project (including data analysis and final written papers), a Completion Report must be submitted to the IRB.
3. **Unanticipated Problems and Adverse Events:** Unanticipated problems and adverse events must be reported to the IRB immediately.
4. **Reports of Potential Non-compliance:** Potential non-compliance, including deviations from protocol and violations, must be reported to the IRB office immediately.
5. **Amendments:** Changes to the protocol must be requested by submitting an Amendment to the IRB for review. The Amendment must be approved by the IRB before being implemented.
6. **Consent Forms:** When using a consent form or information sheet, you must use the IRB stamped approved version. Please log into iRIS to download your stamped approved version of the consenting instruments. If you are unable to locate the stamped version in iRIS, please contact the office.
7. **Audit:** Your protocol may be subject to audit by the Human Subjects Post Approval Monitor. During the life of the study please review and document study progress using the PI self-assessment found on the

RCB website as a method of preparation for the potential audit. Investigators are responsible for maintaining complete and accurate study records and making them available for inspection. Investigators are encouraged to request a pre-initiation site visit with the Post Approval Monitor. These visits are designed to help ensure that all necessary documents are approved and in order prior to initiating the study and to help investigators maintain compliance.

8. **Recruitment**: All approved recruitment materials will be stamped electronically by the HSPP staff and available for download from iRIS. These IRB-stamped approved documents from iRIS must be used for recruitment. For materials that are distributed to potential participants electronically and for which you
   can only feasibly use the approved text rather than the stamped document, the study's IRB Protocol number, approval date, and expiration dates must be included in the following format: TAMU IRB#20XX- XXXX Approved: XX/XX/XXXX Expiration Date: XX/XX/XXXX.

The Office of Research Compliance and Biosafety is conducting a brief survey for the purpose of programmatic enhancements. Click here to take survey or copy and paste in a browser https://tamu.qualtrics.com/SE/?SID=SV_1CgOkLNU45QebvT

This electronic document provides notification of the review results by the Institutional Review Board.

750 Agronomy Road, Suite 2701
1186 TAMU, College Station, TX 77843-1186
Tel.979.458.1467 Fax.
979.862.3176
http://rcb.tamu.edu

DIVISION OF RESEARCH

Research Compliance and Biosafety

DATE: April 03, 2015

MEMORANDUM

TO: Jia Wang TAMU - College Of Education - Educational Adm & Human Resource Develop

FROM: Dr. James Fluckey Chair Institutional Review Board

SUBJECT: Continuing Review – Approval

Study Number: IRB2013-0348D

Title: Staying local: A multiple case study of employees moving from expatriate to local contracts at multinational organizations in Sweden and the United States

Approval Date: 06/03/2013

Continuing Review Due: 03/01/2016

Expiration Date: 04/01/2016

Documents Reviewed and Approved:

Submission Components			
Study Document			
Title	Version Number	Version Date	Outcome
Recruitment email & phone call	Version 2.3	05/17/2013	Approved
Interview Questions_Staying	Version 2.3	05/16/2013	Approved

Local...			
Kjerfve Consent Form-EAHR	Version 1.8	05/16/2013	Approved

Document of Consent: Written consent in accordance with 45 CF 46.116/ 21 CFR 50.27

Comments: The continuing review for this study has been approved.

This research project has been approved. As principal investigator, you assume the following responsibilities:

1. **Continuing Review**: The protocol must be renewed by the expiration date in order to continue with the research project. A Continuing Review application along with required documents must be submitted by the continuing review deadline. Failure to do so may result in processing delays, study termination, and/or loss of funding.
2. **Completion Report**: Upon completion of the research project (including data analysis and final written papers), a Completion Report must be submitted to the IRB.
3. **Unanticipated Problems and Adverse Events**: Unanticipated problems and adverse events must be reported to the IRB immediately.
4. **Reports of Potential Non-compliance**: Potential non-compliance, including deviations from protocol and violations, must be reported to the IRB office immediately.
5. **Amendments**: Changes to the protocol must be requested by submitting an Amendment to the IRB for review. The Amendment must be approved by the IRB before being implemented.
6. **Consent Forms**: When using a consent form or information sheet, you must use the IRB stamped approved version. Please log into iRIS to download your stamped approved version of the consenting instruments. If you are unable to locate the stamped version in iRIS, please contact the office.
7. **Audit:** Your protocol may be subject to audit by the Human Subjects Post Approval Monitor. During the life of the study please review and document study progress using the PI self-

assessment found on the RCB website as a method of preparation for the potential audit. Investigators are responsible for maintaining complete and accurate study records and making them available for inspection. Investigators are encouraged to request a pre-initiation site visit with the Post Approval Monitor. These visits are designed to help ensure that all necessary documents are approved and in order prior to initiating the study and to help investigators maintain compliance.

8. **Recruitment:** All approved recruitment materials will be stamped electronically by the HSPP staff and available for download from iRIS. These IRB-stamped approved documents from iRIS must be used for recruitment. For materials that are distributed to potential participants electronically and for which you can only feasibly use the approved text rather than the stamped document, the study's IRB Protocol number, approval date, and expiration dates must be included in the following format: TAMU IRB#20XX- XXXX Approved: XX/XX/XXXX Expiration Date: XX/XX/XXXX.
9. **FERPA and PPRA:** Investigators conducting research with students must have appropriate approvals from the FERPA administrator at the institution where the research will be conducted in accordance with the Family Education Rights and Privacy Act (FERPA). The Protection of Pupil Rights Amendment (PPRA) protects the rights of parents in students ensuring that written parental consent is required for participation in surveys, analysis, or evaluation that ask questions falling into categories of protected information.
10. **Food:** Any use of food in the conduct of human subjects research must follow Texas A&M University Standard Administrative Procedure 24.01.01.M4.02.
11. **Payments:** Any use of payments to human subjects must follow Texas A&M University Standard Administrative Procedure 21.01.99.M0.03.

This electronic document provides notification of the review results by the Institutional Review Board.

APPENDIX B

TEXAS A & M UNIVERSITY

CONSENT FORM

Project Title: Staying local: A multiple case study of employees moving from expatriates to local contracts at two multinational organizations

You are invited to take part in a research study being conducted by Jia Wang and Tania Kjerfve researchers from Texas A&M University. The information in this form is provided to help you decide whether or not to take part. If you decide to take part in the study, you will be asked to sign this consent form. If you decide you do not want to participate, there will be no penalty to you, and you will not lose any benefits you normally would have.

Why Is This Study Being Done?

The purpose of this study is to explore the experiences of employees moving from expatriate to local contracts in multinational organizations, more specifically in two multinational organizations located in Sweden and the United States.

Why Am I Being Asked To Be In This Study?

You are being asked to be in this study because you have been identified as someone who were employed on an expatriate contract and moved to a local contract at a multinational organization.

How Many People Will Be Asked To Be In This Study?

Eight people (participants) will be invited to participate in this study.

What Are the Alternatives to being in this study?

No, the alternative to being in the study is not to participate.

What Will I Be Asked To Do In This Study?

You will be asked to describe and reflect upon your experiences of moving from expatriate to local contract at a multinational organization. Your participation in this study will last up to three hours over a two-week period and will include two meetings. Each of the

recorded interviews will last approximately 45 to 60 minutes. If necessary, a third interview will take place to clarify issues not addressed or understood on the previous interviews. You will be asked to review the transcript of the interview for accuracy.

Will Photos, Video or Audio Recordings Be Made Of Me during the Study?

The researchers will make an audio recording during the study so that data can be collected. If you do not give permission for the audio recording to be obtained, you cannot participate in this study.

I give my permission for audio to be made of me during my participation in this research study.

I do not give my permission for audio to be made of me during my participation in this research study.

Are There Any Risks To Me in Taking Part of This Study?

The things that you will be doing are no more/greater than risks than you would come across in everyday life. Information collected through the interviews will be kept confidential and you will not be personally identified by name in this study. A pseudonym will be used for identification. Although the researchers have tried to avoid risks, you may feel that some questions/procedures that are asked of you will be stressful or upsetting. You do not have to answer anything you do not want to. Information about individuals and/or organizations that may be able to help you with these problems will be given to you.

Will There Be Any Costs To Me?

Aside from your time, there are no costs for taking part in the study.

Will I Be Paid To Be In This Study?

You will not be paid for being in this study.

Will Information From This Study Be Kept Private?

The records of this study will be kept private. No identifiers linking you to this study will be included in any sort of report that might be published Research records will be stored securely and only Jia Wang and Tania Kjerfve will have access to the records.

Information about you will be stored in locked file cabinet and computer files protected with a password. This consent form will be filed securely in an official area.

People who have access to your information include the Principal Investigator and research study personnel. Representatives of r e g u l a t o r y agencies such as the Office of Human Research Protections (OHRP) and entities such as the Texas A&M University Human Subjects Protection Program may access your records to make sure the study is being run correctly and that information is collected properly.

Who may I Contact for More Information?

You may contact the Principal Investigator, Jia Wang, Associate Professor, to tell her about a concern or complaint about this research at (979) 862-7808 or jiawang@tamu.edu. You may also contact the co- investigator, Tania Kjerfve, at taniakjerfve@tamu.edu

For questions about your rights as a research participant or if you have questions, complaints, or concerns about the research, you may call the Texas A&M University Human Subjects Protection Program office at (979) 458-4067 or irb@tamu.edu.

What if I Change My Mind About Participating?

This research is voluntary and you have the choice whether or not to be in this research study. You may decide to not begin or to stop participating at any time.CONSENT FORM

STATEMENT OF CONSENT

I agree to be in this study and know that I am not giving up any legal rights by signing this form. The procedures, risks, and benefits have been explained to me, and my questions have been answered. I know that new information about this research study will be provided to me as it becomes available and that the researcher will tell me if I must be removed from the study. I can ask more questions if I want. A copy of this entire consent form will be given to me.

IRB NUMBER: IRB2013-0348D IRB APPROVAL DATE: 04/03/2015 IRB EXPIRATION DATE: 04/01/2016

Participant's Signature Date

Printed Name Date

INVESTIGATOR'S AFFIDAVIT:

Either I have or my agent has carefully explained to the participant the nature of the above project. I hereby certify that to the best of my knowledge the person who signed this consent form was informed of the nature, demands, benefits, and risks involved in his/her participation.

Signature of Presenter Date

Printed Name Date

IRB NUMBER: IRB2013-0348D IRB
APPROVAL DATE: 04/03/2015
IRB EXPIRATION DATE: 04/01/2016

APPENDIX C

Interview Protocol

Interview No. 1 -The first interview will capture the participant's career history.

1. Tell me about your career history

2. Tell me about your international career history

Interview No. 2 -The second interview will investigate more in depth t h e experience of m o v i n g f r o m a n expatriate to a local contract, asking the participant to specifically reconstruct a detailed experience when concerning their career transition, social identity, and status passage under different forms of contractual employment.

1. Tell me about the termination of the expatriate assignment regarding career transition

2 Please describe your perception of self (professional &personal) along your international career, focusing on three moments –prior, during, and post termination of expatriate assignment.

3. Please describe the passage from being an expatriate to becoming a localized expatriate, please elaborate on the stages of this passage.

IRB NUMBER: IRB2013-0348D IRB APPROVAL DATE: 04/03/2015 IRB EXPIRATION DATE: 04/01/2016

4. Please describe the relationship with other employees in the organization at two moments – during expatriate assignment and after becoming localized employee

5. (Concluding remarks). Any more information or reflection you wish to add

IRB NUMBER: IRB2013-0348D IRB APPROVAL DATE: 04/03/2015 IRB EXPIRATION DATE: 04/01/2016