

[Open Peer Review on Qeios](#)

Beyond culture shock: entering the complex world of Global South expatriates' adaptation

Dieu Hack-Polay¹, Ali B. Mahmoud²

¹ University of Lincoln

² St. John's University

Funding: No specific funding was received for this work.

Potential competing interests: No potential competing interests to declare.

Abstract

This paper aims to review the literature addressing the barriers to integrating Global South expatriates assigned to Western countries. This general review offers a literature-informed conceptual framework articulating the antecedents of issues facing Global South expatriates in relation to adaptation in Western contexts. The data was gathered through rapid literature review and analysed thematically. The analysis indicates that several complex issues impede Global South expatriates' effective adjustment to host countries deployed in Western countries. These factors include culture distance, ethnic prejudice, social isolation, children and family issues, and homesickness. Such issues can negatively impact the performance of Global South expatriates and their future career prospects. Organisations need to create psychological safety for effective adjustment. This paper is one few to highlight the Global South expatriates' adaptation issues that are poorly addressed in the literature with reference to Global South expatriates. The expatriate literature is often biased towards Western expatriates, ignoring the situation of psychological insecurity caused by psycho-social factors that hamper Global South expatriates' integration.

Dieu Hack-Polay¹ and Ali B. Mahmoud²

¹ *University of Lincoln (UK) and Crandall University (Canada)*

² *New York St Johns University (USA)*

Keywords: Expatriate; Intellectual capital; Culture; Global South; Adaptation.

Introduction

Previous research has demonstrated that both the business and human resource (HR) leaders acknowledge the criticality of intellectual capital and people management for the survival and future of their global business (Thite *et al.*, 2014). An

effective global strategy relies on the use of expatriates as agents of change and knowledge transfer. Following Harzing, Pudelko and Reiche (2015), we define expatriates as employees deployed by the organisations from headquarters to subsidiary locations and vice versa. Competitive advantage results from putting this understanding into practice (Hack-Polay and Mahmoud, 2020). It is often contended that a significant value of expatriation is that a company has a trusted employee at the site for strategic coordination (Tarique *et al.*, 2016). This is equally a route to career and organisational development. Returning expatriates have relevant experience in handling foreign experience which can be used by multinational companies (MNC) for future projects. The expatriate is trained for the relevant skills before leaving and hence the organisation can be assured that the manager is capable of transferring the knowledge. This implies that global business operations cannot be divorced from a company's ability to source quality expatriates but also to nurture and support them in their place of assignment. The inability of these expatriates to transfer their knowledge can be detrimental to both the subsidiary and the global brand and competitiveness of the mother company (Đorđević, 2016; Bonache *et al.*, 2018). The development of such an ability derives from the development of intercultural competence, which is the foundation of adaptability, i.e., understanding and articulating difference effectively by constructing relationships and team identity in the expatriates' new location. Deficient human resource practices that fail to recognise and frame effective policies and procedures in that respect are the sources of the significant expatriate failure prevalent in the expatriate literature (Beregszaszi and Hack-Polay, 2015; Tarique *et al.*, 2016; Deresky, 2017). While the issues causing expatriate failure have been studied in general, there has been no specific and wider studies focusing on Global South expatriates. In fact, much of the existing literature has centred on Western expatriates in other industrialised nations or assigned in developing and emerging economy contexts.

The main research questions of this review, thus, are: Among the general issues facing expatriates, to what extent are some of these issues amplified for Global South expatriates with assignment in the West? Are there issues that could be more specific to Global South expatriates in Western locations? This general review paper aims to review the literature on barriers to integrating Global South expatriates in the headquarters of their employing multinational companies or their deployment in western subsidiaries (Wolfgang *et al.*, 2012). We used the rapid literature review method, focusing on the potential cultural and psychological issues that might present barriers to the effective deployment of these valuable human resources (Nunes *et al.*, 2017). The importance of this research is inextricably linked to the ongoing globalisation of business and international relations, with their associated travel of labour and intellectual capital — a critical intangible asset for firms (Schiavone *et al.*, 2014; Baima *et al.*, 2020). Given the contemporary and topical significance of the topic, this paper is a precursor of wider empirical papers based on extensive data collection in the future. In this paper, we aim to develop a conceptual model that will support future empirical investigations. The article first situates Global South expatriates within the expatriation literature. It then discusses the main barriers of impediments to the transfers of their intellectual capital to Western host countries and provides a critical discussion of these impediments to arrive at a conceptual model for effective practice.

To achieve this inquiry's objectives, we adopted a multi-step approach identified by Templier and Paré (2015). First, we formulated the research question of the current study. We sought to learn about the most critical impediments to transferring global south expatriates' intellectual capital to the West. Second, we combed the extant literature to identify

the sources that would feed our theoretical framework. Third, we consulted two independent expert reviewers— a process that helped us limit the bias of our selection of the sources. Fourth, we employed thematic analysis of the impediments reported in previous research which ultimately formed the basis for articulating our theoretical model.

Perspectives on expatriation and Global South expatriates

Recent statistics show that around 3.3% of the global population (approximately 244 million) lives and works abroad more than at any point in history (IOM, 2017; OECD, 2017; McNulty and Brewster, 2019). Further, matching labour surplus in sourcing countries with skills demands and shortages in destination countries has been deemed a challenging process that entails the need for strengthening the links between labour migration management and skills development methods (OECD, 2019). The term expatriation is not identical to migration and rather embodies a multitude of concepts.

Expatriation implies a voluntary decision by someone who surrenders their allegiance to their home country (McNulty and Brewster, 2019) and can be defined as the movement of highly skilled individuals from developed to developing countries (Festing *et al.*, 2013; Baruch *et al.*, 2016; Latukha *et al.*, 2019). This often entails that expatriates travel to another country physically and what is notable about this definition is that while some people talk about 'internal exile', they do not speak directly about 'internal expatriation' (McNulty and Brewster, 2019).

On the other hand, Finaccord (2018) describes expatriates as individuals who, for at least twelve months and less than five years, set up their residence in different countries and have previously resided in another country. Part of the growing internationalisation of businesses is reflected in the mobility of individuals across international borders. It involves the movement of human capital, that is to say, expatriation (Latukha *et al.*, 2019). Thus, through the formation of international subsidiaries, joint ventures and strategic partnerships, the number of expatriates has risen. It is set to soar to 87.5m by 2021 (Finaccord, 2018). The same as migrants, expatriates live and work abroad, i.e., somewhere other than the home country where 'home' is defined by their passport and their citizenship (McNulty and Brewster, 2019). Global trade grew by more than 50 per cent from 2005 to 2015, with nearly 60 per cent of the surge linked to mounting exports from developing countries, which is also known as 'Global South'. According to Dados and Connell (2012), the term 'Global South' applies historically to the countries of Latin America, Asia, Africa and Oceania. It is a group of expressions, like 'Third World' and 'Periphery,' which describe areas outside Europe and North America, predominantly (while not all) low-income and sometimes politically, culturally or socially marginalised (Dados and Connell, 2012). Further, 'Global South' positions its countries in contrast to the Global North's high-income nations (Hollington *et al.*, 2015).

In a globalised post-industrial digital society, most expatriates represent the intellectual capital that the firms need in order to be competitive. For instance, experience managing a business or working outside the home organisation is almost invariably recognised as a critical developmental experience for international managing directors (Hatch, 2008). Expatriates create intangible added value for organisations while increasing the gross domestic product (GDP) in the countries in which they are based (Sánchez-Zarza and Saiz-Álvarez, 2014). As a result, there is increased rivalry between companies to have the best intellectual capital to bring about competitiveness and efficiency.

The thought of being an expatriate sounds enticing, but most people struggle to adapt to their new environment. The less the expatriates interact with host nationals, the higher the likelihood will be of feeling isolated and lonely in the host country. Moreover, such emotions will likely worsen when the expatriates lack a command of the host language that enables them to communicate with host nationals. Such matters should be monitored closely, as an expatriate who does not like their current global role is likely to start looking for employment outside the region. Numerous researchers, by comparison, have discussed an individual's degree of psychological gratification with certain facets of their new environment (Black, 1990; Parker and McEvoy, 1993; Caligiuri, 2000; Noman *et al.*, 2020).

Impediments to the adaptation of Global South expatriates

The reasons for expatriate failure or underperformance have been the subject of extensive literature (Tarique *et al.*, 2016; Deresky, 2017; Bonache *et al.*, 2018; Hack-Polay, 2020) in the past three decades or so. These reasons often centre on deficiencies in pre-departure preparation, insufficient in-country support and cultural adaptability of the expatriate. Though these reasons may apply to expatriates generally, examining the literature, we found that they may have particular resonance for Global South expatriates (expatriates for formerly colonised nations and emerging economies). A few aspects may also be specific to Global South expatriates in no small extent. This section discusses six key factors that we found more pertinent to non-western expatriates assigned to Western locations. These include *culture distance*, *culture shock*, *race and prejudice*, *family issues*, *homesickness* and *internal human resource management issues*.

Culture distance

The concept of 'Culture' establishes the perception that all people live and find meaning in a world that is conceived by human beings (Edgar and Sedgwick, 2008). In cultural studies, culture is seen as a whole way of life; as a language; as a representation; as a tool; as practices; as artefacts; as spatial measures; as power; as low or high; as mass and as widespread (Barker, 2004). Thus, culture is the multifaceted daily life people experience and move through, and it occurs at the point where people go beyond the boundaries of their natural legacy (Edgar and Sedgwick, 2008).

According to Hodgetts and Stolte (2014), people from varied groups across different societies encounter connection and solidarity in some social situations and distance and estrangement from members of different groups in other conditions. The notion of social distance was created to expand knowledge and understanding of practices of estrangement and acceptance amongst groups of people in cities where Individuals from various backgrounds often come into contact with each other (Hodgetts and Stolte, 2014). Social distance is a tool for *social separation* triggered by perceived or actual variations between groups of individuals as outlined by eminent social classifications. It highlights various socio-economic attributes, comprising gender, age, race, ethnicity, nationality, faith, sexuality and culture (Crossman, 2020).

Looking at the cultural distance from an expatriation angle, it appears to originate from the idea of "psychic distance" (Johanson and Vahlne, 1977), explaining disparities in growth, education, business and language, cultural values alongside the degree similarity between the two nations. The international business literature has often used cognitive

variations and cultural isolation terms interchangeably (Shenkar *et al.*, 2008). Nevertheless, according to Evans and Mavondo (2002), both frameworks can be distinguishable because cultural distance examines socio- variations between the two countries. In contrast, the psychological divide applies to organisational expectations (Evans and Mavondo, 2002). Cultural distance has been found to play a significant role in determining the levels of job attitudes held by expatriates. For instance, Froese and Peltokorpi (2011) found that cultural distance negatively predicted job satisfaction for expatriates. Therefore, businesses should understand that cultures in the country of origin and the destination country can vary greatly and that this variation can have a considerable impact (i.e., cultural distance) on the capacity of their expatriates to adapt and function effectively. For example, Wang and Varma (2017) point out that firms need to be mindful that the extent of cultural distance between the host countries of their expatriates and the original country of the businesses may have differential consequences on the adjustment and success of expatriates.

Culture shock

Black and Gregersen (1991) describe the concept of *culture shock* as a stress-stimulated response to all the different behavioural norms and the resulting uncertainty that the individual has to contend with. In particular, culture shock is predominantly an indicator of the strain that develops as an outcome of uncertainty, disappointment, and perhaps even irritation (Sims and Schraeder, 2004). Adjustment has been regarded as a critical issue facing expatriates (Hack-Polay, 2020). In this regard, Rui and Wang (2015) describe cross-cultural adaptation or adjustment as a culture shock created by the process of individual adjustment to a different culture in a foreign country. In many respects culture shock is an *unsatisfactory* term, as it can be argued to objectify behavioural processes, and, perhaps, that is why it is used synonymously with the word “adaptation” or “adjustment” in previous research (Fitzpatrick, 2016). Stress can cause individuals away from their homeland, continually thinking about their home country, experiencing poor sleep, refusing to eat food and feeling vulnerable and anxious (Ikafa *et al.*, 2020).

Expatriation requires, however, moving the employee to a foreign country, a new social organisation and a new way of working in a new community. As such, expatriates are also exposed to a cultural shock induced by the distress generated by losing familiar signs and symbols of social interaction and expressed in the difficulties of cultural adaptation in their host country to operate appropriately (Pires *et al.*, 2006). Since culture shock is a stress-stimulated response, the expatriate should receive proper training that regular exercise and a healthy diet can significantly enhance the body’s reaction to this stress (Avril and Magnini, 2007). Since the organisation’s investment in expatriates is often significant, poor performance with or without premature repatriation can eventually endanger the achievement of business goals and the hope of the expatriate of a successful career in the organisation (Pires *et al.*, 2006). Achieving the goals of an expatriate programme (and this involves the successful resolution of the culture shock) depends on positive adaptations by the expatriate to a new culture (Mumford, 1998). The expatriate failure costs have motivated scholars to attempt to identify the triggers of cultural shock and hence reducing the amount of culture shock resulting during expatriation (Pires *et al.*, 2006; Furnham, 2019).

Race and prejudice

Despite globalisation, race relations in many countries have not improved. In fact, the meeting of cultures and ethnicities was meant to create a system where we are more alike – so moving towards convergence (Tregaskis and Brewster, 2006). Such convergence would be facilitated by greater knowledge about each other's cultures, plural languages and the spread of democracy. However, it appears, for some authors, that globalisation has occasioned quite the opposite effect in many contexts. The more people meet, the sharper cultural differences surface and the more various social and politico-economic system clash (Mutabazi and Derr, 2017; Neiterman *et al.*, 2018). This has left expatriates and people on the move stranded in the heated intersections. As racism affects people on the move, including expatriates, there develops a feeling of strangeness towards the host country (Neiterman *et al.*, 2018; Hack-Polay and Mahmoud, 2020). Berry and Bell (2012) found evidence that expatriates can be interiorised in certain locations due to several characteristics that they display, e.g. ethnicity, nationality. Languages intonation and ethnic backgrounds also serve as bases for discriminating against certain categories of expatriates (Reiche *et al.*, 2017; Hack-Polay, 2020). In this context, it is clear that there will be an association between expatriation, nostalgia and obsessive thoughts about home, which hampers the focus on the expatriate assignment. If the Global South expatriates do not find the expatriate posting as meaningful and psychological rewarding as their position in their home country. Berry and Bell (2012) explain that not all expatriates are treated fairly in foreign locations and race and ethnicity, as well as other socio-cultural parameters, are used to isolate some expatriates. Some of Hack-Polay's (2020) participants contended that their experiences and contributions were less valued because of a perceived less complex work realities and educational systems they have been involved in in the home countries; thus, they felt devalued professionally and ethnically, which meant that they were often hesitant to speak about their experiences and innovate. If vigorous actions are not taken by the organisations to remedy damaging biases towards Global South expatriates, the investment of the organisation in those valuable human resources will bear limited positive return in term of advancing the expatriates' career development and the ability to transfer and deploy their intellectual capital effectively in their current and future assignments.

Family issues

With seventy per cent of all expatriates have partners (Finaccord, 2018), moving abroad seems to be mainly a family decision for expatriates. Family members, primarily the partner, are the primary source of the social support for the expatriates (Khedher and Asadullah, 2019). Many expatriates and their families move to foreign countries and often face difficult challenges, such as adapting to the new culture and successfully surfing the new workplace environment (Đorđević, 2016). The efficient transition and positive overall experience of expatriates is an essential goal for the organisations, as well as for the host country that also gains from this cascade of needed expertise (Dimitrova, 2018). As a result, investigating the aspects revolving around the expatriates' children and families has become an integral part of the scholarly discourse in the expatriation literature. The first research inquiries (Hays, 1974), in this regard, reported that family-related issues are the top reason for the failure of the expatriate appointment. Moreover, according to a recent report by Crown World Mobility, that conclusion is still valid today (Johnson, 2019).

Most children regard "home" as the place where their parents are and they can adjust to the move, especially if they can stay in contact with their friends. However, upon their arrival in the host country, parents need a fair amount of time to

listen to their children and speak with them, mainly about challenges with adaptation (Gamble and Hawker, 2019). In Hofstede's (1980) culture model, many of the cultures of the Global South fall into collectivism, which suggests strong family bond within the extended family networks. Family adjustment in this context is a sophisticated and multi-faceted process which requires greater awareness on the part of the family as well as the organisation (Haslberger and Brewster, 2008) due to the separation of the extended family that traditionally provides unconditional support in many Global South cultures. The absence of career development is a significant cause for the partner's dissatisfaction, which has a detrimental effect on the productivity of expatriates (Van Erp *et al.*, 2011). For instance, according to Sarkiunaite and Rocke (2015), children's education and partner's employment are the two greatest challenges to expatriates' adjustment. More likely, a spouse's professional opportunity is curbed by immigration restrictions (Erogul and Rahman, 2017).

Homesickness

Homesickness has long been an overlooked area of inquiry in international human resource management (Hack-Polay and Mahmoud, 2020). The authors argue that expatriate relocation carries with it significant emotional stress resulting from the separation from known socio-cultural realities and social isolation, in many cases. Homesickness is one of the key resulting negative impacts of relocation, which is under-studied in the international management literature, yet with far-reaching consequences. Increasing evidence is surfacing which situates acute homesickness as part of the ensuing social isolation, thus a pathological mental state (Hack-Polay, 2020). Further, significant research (Weissman and Paykel, 1972; Ekblad, 1993; Averill and Sundararajan, 2014) argued that homesickness is not only an illness itself but it also impacts on the sufferers' physical health. A number of research investigations (Stroebe *et al.*, 2015; Hack-Polay and Mahmoud, 2020) contend that homesickness has the capacity to affect expatriates to a large degree based on evidence about its greater prevalence among people on the move who are faced with significant social isolation.

Averill and Sundararajan (2014) explain that homesickness can have dramatic social implications for expatriates due to social isolation that they may face. This, in turn, has important ramifications such as social withdrawal (Coplan and Bowker, 2014), irritability, lack of cooperation with colleagues and lack of engagement with work (Hack-Polay, 2020). Thus, emerging evidence supports the view that portrays homesickness as an illness that could have important consequences for individual expatriates and their organisations. Homesickness, as a mental health issue affecting Global South expatriates, can disrupt performance, damage the knowledge transfer process (a key reason for expatriate use).

Internal organisational (in) capabilities

Overall, human resource management (HRM) policies and procedures of recruitment, training, incentives, benefits, promotion, involvement, and health and safety have been found to predict organisational performance positively (Katou and Budhwar, 2007) via improving employee skills, attitudes and organisational outcomes (Katou and Budhwar, 2006) and hence being a crucial promoter of the added value to organisations and their stakeholders (Horwitz *et al.*, 2015). A significant piece of research by Afacan Findıklı *et al.* (2015) covering over one hundred Turkish companies showed that if human resource processes and practices are weak, the companies experience major difficulties in identifying, and utilising

effectively their internal body of knowledge, as well as capabilities. This lends support to the argument about the linkages that exist between strategic HRM approaches and organizational innovation and creativity. Such a perspective suggests that developing and using core practices around recruitment and selection, the management of expatriate performance and support provided during the expatriate assignment— such as cultural awareness, information and advice & counselling-) assist expatriate integration and positively deploy the organisational and professional knowledge and competencies that the Global South expatriates bring (Mellahi and Budhwar Pawan, 2010; Budhwar and Mellahi, 2016; Budhwar *et al.*, 2016). Though the compensation and rewards system may be adequate, often the weaknesses in tailored HR practices that can mitigate emotional issues in the expatriates become critical impediments for expatriate knowledge transfer that could enhance organisational capabilities and competitive advantage (Deresky, 2017; Hack-Polay, 2020).

A significant body of evidence links the effectiveness and efficiency in human resource practices, (e.g. induction, learning and development, performance appraisals, assignment overlap, coaching and mentoring, etc.) to organisational and expatriate employee effectiveness (Caligiuri and Tarique, 2012; Chow *et al.*, 2013; Bonache and Festing, 2020; Hack-Polay, 2020).

Discussion

International human resource management is a significant area of organisational management with regards to the articulation the international business and integration in the area of globalisation more generally. Therefore, research paradigms in the field ought to be more systematic (Bonache and Festing, 2020). Much evidence in the past three decades or so that expatriate failure is a phenomenon of concern to multinational organisations (Harzing and Christensen, 2004; Horwitz *et al.*, 2015). Though the extent of expatriate failure is often linked to a blend of issues, e.g. culture, socialisation, relationships with hosts, etc.) have drawn some consensus as representing some major drivers of expatriate failure (Horwitz *et al.*, 2015; Hack-Polay and Mahmoud, 2020). However, there are various other factors that enter the expatriate failure equation and could compound the issues faced by Global South expatriates which lead to the difficulties in transferring their intellectual capital to the host Western posting, thus impacting their performance. Since expatriation is geared at employee development, transfer of organisational knowledge and competencies, and co-ordination, expatriates spend a substantial amount of their time in host countries (Bonache *et al.*, 2018). Thus, the management of relocation can be viewed as a vital endeavour for both expatriate and organisation. There is a strong expectation that Global South expatriates adjust to the new cultures and social environments. For instance, the degree of gender mix acceptance, or religious tolerance, etc. could be accounted for in expatriate preparation since these are powerful elements of cultural differences that could present critical challenges for interaction between expatriates and employee mix in Western postings. Failing to develop satisfactory human resource practices, these cultural issues could be magnified and be more detrimental. This situation exemplifies the weight of national culture on organisational and psychological processes (Đorđević, 2016).

Previous international human resource management (IHRM) studies identifying and evaluating factors barring the effectiveness of expatriate intellectual capital transmission following international placements have primarily focused on

Western expatriates' experiences. In reviewing the literature, we found that Global South expatriates as units of analysis received scant scholarly attention— representing a novel research gap given the growing travels of individuals, as intellectual assets, from the Global South through the international *veins* of their multinational organisations to the West. Thus, this inquiry set out with the aim of proposing a conceptual framework postulating the factors that can contribute to Global South expatriates' failures in their appointments in Western settings.

The results of our review suggest that there is a number of barriers that could act as a hindrance of Global South expatriate intellectual capital deployment in the West. These impediments comprise of cultural distance, cultural shock, race and prejudice, children and family issues, homesickness and internal organisational HRM matters. These issues are conceptualised in the conceptual model shown in Figure 1.

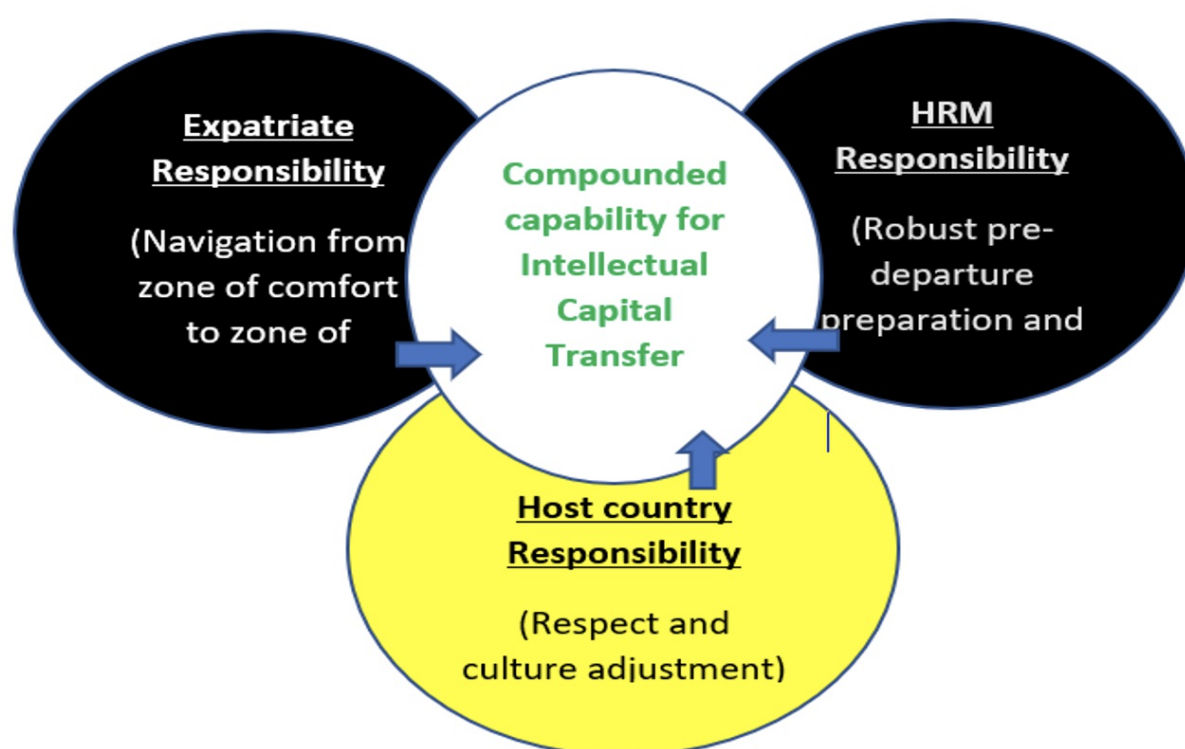


Figure 1. Model for expatriate intellectual capital transfer among Global South expatriatesSource (authors)

The combination of factors in Figure 1 provides enhanced adaptability capabilities for Global South expatriates. This is particularly significant given the added disadvantage they may experience in Western locations due to issues of racism, culture distances and limited valuing of their developing country experience associated with the colonial legacy. Ethnocentrism - the tendency of seeing the world through the lens of one's own cultural beliefs - can hinder the settlement process in the new expatriate location (Brewer, 2005; Hack-Polay et al., 2021). This implies that individuals tend to adjudicate others' attitudes, traditions, beliefs, and behaviours by their own cultural norms (Brewer, 2005; Hack-Polay et al., 2021). Individuals' ethnocentrism has been identified as one of the socio-cultural barriers to success in host countries (Hack-Polay et al., 2021). Expatriates with high ethnocentrism are thought to report lower scores of self-rated job performance (Caligiuri et al., 2016). However, the onus should not be placed on the expatriate alone to foster adaptation,

but the organisation must take decisive action in establishing positive HRM strategies for both internal and external action, i.e. internal training and development as well as external community sensitisation. Additionally, evidence indicates that the community's attitudes in the host country have a significant bearing on the settlement of expatriates. A recent study by Varma et al. (2018) investigated host- country national (HCN) disposition to offer support to expatriates from the BRICS countries (Brazil, Russia, India, China, and South-Africa) and their results revealed that expatriate humility, unlike expatriate's profession type or country of origin, linked firmly to HCN tendency to offer support. In line with that, Farh *et al.* (2010) introduce three conditions for social support offered by HCNs to expatriates to ensue. First, the expatriates will need to be open to feedback and support from HCNs. Second, HCN co-workers' supportiveness will need to be perceivable by the expatriates. Third, HCNs will need to own such a tendency towards supporting their expatriate co-workers. Table 1 below breaks down these spheres of responsibilities.

Table 1. Summaries of responsibilities in enabling Global South Expatriate adaptation

Group	Responsibilities	Which Impediments to IC transfer effort contributes to?
<i>Global South expatriate</i>	<ul style="list-style-type: none"> • Cultural learning • Involvement in local community groups • Independent learning • Familiarization with organizational processes • Search for counselling assistance • Maintain contact with relatives at home 	<ul style="list-style-type: none"> • Culture distance • Social isolation • Homesickness • Children and family issues
<i>Organisation</i>	<ul style="list-style-type: none"> • Pre-departure information and training • Pre-assignment visit • In-country cross-cultural training • Comprehensive induction • In-country training in organizational processes • Introduction to local community groups • Home visit financial assistance • Concern and suggestion box • Regular mental health checks for expatriates and family members • Assistance with spouse employment • Assistance with children education 	<ul style="list-style-type: none"> • Culture shock • Culture distance • Racial issues • Children and family issues • Social isolation • Homesickness <p>**</p>
<i>Host community</i>	<ul style="list-style-type: none"> • Inclusion of expatriates and newcomers • Welcoming social events • Anti-xenophobic campaigns • Cultural awareness in educational curriculum • Inquisitive about new cultures 	<ul style="list-style-type: none"> • Racial issues • Culture distance • Culture shock

***As can be seen, Organisation (HRM) action will contribute to soothing most issues impeding intellectual capital (IC) transfer (Source: authors)*

Conclusion

Summary

This theoretical inquiry has come to respond to the lack of research on the factors impeding the success of the intellectual capital operation of Global South expatriation in the West. Accordingly, this paper has reviewed previous research and proposed a theoretical framework for the factors that could adversely affect the expatriates' performance during their assignments in Western countries. Through the use of rapid literature review, the study has identified six critical impediments that are suggested to form the theoretical premise for future empirical investigations. These are *culture distance*, *culture shock*, *race and ethnicity*, *homesickness*, *family*, and *internal organisational* issues. There are difficulties in hierarchising these aspects because they are intertwined and tend to affect each other mutually. However, homesickness appears to surface as the single issue that is affected by all other aspects and has equally many ramifications in all the dimensions. For example, the degree to which the Global South expatriate is racialised, isolated, little understand the host culture and worries for children and spouse, etc. triggers obsessive thoughts about home – thus homesickness (Hack-Polay, 2020). Equally, the acuteness of homesickness amplifies issues at home (impatience with children and spouse), the degree to which the expatriate withdraws from participation in the new team and culture and accepts some held stereotypes. It was also felt that race and prejudice lead to social isolation, causing the development of obsessive thoughts about home, and resistance of many Global South expatriates to engage with the host culture and community. Thus, this review concludes that though expatriates face the examined issues generally, these issues (particularly homesickness and racial prejudice) have more resonance and ramifications for non-western expatriates deployed in Western locations. These intertwined and complex psycho-social phenomena significantly cause a situation of psychological insecurity which impairs the expatriates' ability to think, be creative and deploy potentially critical transferrable knowledge and skills.

Implications and further research

The conclusions have several significant implications for human resource management. It is important that awareness about these issues is raised during the pre-departure preparation to mitigate culture shock and lack of community participation when the Global South expatriates land in Western location. Given the severity of these issues, the importance of pre-assignment visit is heightened. Such visits will enable the Global South expatriate to appraisal local realities more practically and speak to existing expatriates. Overlaps will also enable the new assignees to be on the one hand, immersed in the lived realities of departing expatriate and on the other hand developing mental preparedness.

Though this study has used evidence from several previous studies, it has established a conceptual model that require testing in practice to verify the weight of the issues identified and ascertain whether other may exist that have not been captured. Such empirical studies will give more practical strategies for HRM, the Global South expatriates themselves and the local authorities to implement for a smoother expatriate settlement and productivity.

References

- Afacan Findikli, M., Yozgat, U. and Rofcanin, Y. (2015). Examining Organizational Innovation and Knowledge Management Capacity The Central Role of Strategic Human Resources Practices (SHRPs). *Procedia - Social and Behavioral Sciences*, 181, 377-387.
- Averill, J.R. and Sundararajan, L. (2014). Experiences of solitude: Issues of assessment, theory, and culture. In: R.J. Coplan and J.C. Bowker (eds.) *The handbook of solitude: Psychological perspectives on social isolation, social withdrawal, and being alone.*: Wiley Blackwell.
- Avril, A. B. and Magnini, V.P. (2007). A holistic approach to expatriate success. *International Journal of Contemporary Hospitality Management*.
- Baima, G., Forliano, C., Santoro, G. and Vrontis, D. (2020). Intellectual capital and business model: a systematic literature review to explore their linkages. *Journal of Intellectual Capital*, ahead-of-print.
- Barker, C. (2004). *The Sage dictionary of cultural studies*, London, Sage.
- Baruch, Y., Altman, Y. and Tung, R.L. (2016). Career mobility in a global era: Advances in managing expatriation and repatriation. *J The Academy of Management Annals*, 10, 841-889.
- Beregszaszi, J. and Hack-Polay, D. (2015). Off the overload: the growing HR outsourcing industry in emerging European economies-the case of Hungary. *European Journal of International Management*, 9, 409-424.
- Berry, D.P. and Bell, M.P. (2012). 'Expatriates': Gender, Race and Class Distinctions in International Management. *Gender, Work & Organization*, 19, 10-28.
- Beugelsdijk, S., Kostova, T., Kunst, V.E., Spadafora, E. and van Essen, M. (2018). Cultural Distance and Firm Internationalization: A Meta-Analytical Review and Theoretical Implications. *Journal of Management*, 44, 89-130.
- Black, J.S. (1990). The Relationship of Personal Characteristics with the Adjustment of Japanese Expatriate Managers. *MIR: Management International Review*, 30, 119-134.
- Black, J.S. and Gregersen, H.B. (1991). The other half of the picture: Antecedents of spouse cross-cultural adjustment. *Journal of International Business Studies*, 22, 461-477.
- Bonache, J., Brewster, C., Suutari, V. and Cerdin, J.-L. (2018). The changing nature of expatriation. *Thunderbird International Business Review*, 60, 815-821.
- Bonache, J. and Festing, M. (2020). Research paradigms in international human resource management: An epistemological systematisation of the field. *German Journal of Human Resource Management*, 34, 99-123.
- Budhwar, P.S. and Mellahi, K. (2016). *Handbook of human resource management in the Middle East* Edward Elgar Publishing.
- Budhwar, P.S., Varma, A. and Patel, C. (2016). Convergence-divergence of HRM in the Asia-Pacific: Context-specific analysis and future research agenda. *Human Resource Management Review*, 26, 311-326.
- Caligiuri, P. and Tarique, I. (2012). International assignee selection and cross-cultural training and development. *Handbook of research in international human resource management, 2nd ed.* Northampton, MA, US: Edward Elgar Publishing.
- Caligiuri, P.M. (2000). The big five personality characteristics as predictors of expatriate's desire to terminate the assignment and supervisor-rated performance. *Personnel psychology*, 53, 67-88.
- Chow, I., Teo, S. and Chew, I. (2013). HRM systems and firm performance: The mediation role of strategic orientation.

Asia Pacific Journal of Management, 30, 53-72.

- Coplan, R.J. and Bowker, J. C. (2014). *The handbook of solitude: Psychological perspectives on social isolation, social withdrawal, and being alone*, John Wiley & Sons.
- Crossman, A. (2020). *Definition and Examples of Social Distance in Psychology*[Online]. ThoughtCo. Available: <https://www.thoughtco.com/social-distance-3026589> [Accessed 28 March 2020].
- Dados, N. and Connell, R. (2012). The Global South. *Contexts*, 11, 12-13.
- Deresky, H. (2017). *International management: Managing across borders and cultures: Text and cases* (9th global ed.). Harlow: Pearson.
- Dimitrova, M. (2018). Expatriation and the Work–Family Interface. In: K. M. Shockley, R. C. Johnson and W. Shen (eds.) *The Cambridge Handbook of the Global Work–Family Interface*. Cambridge: Cambridge University Press.
- Đorđević, B. (2016). Impact of national culture on international human resource management. *Economic Themes*, 54, 281-300.
- Edgar, A. and Sedgwick, P. (2008). *Key Concepts in Cultural Theory*, Abingdon, Oxfordshire, Routledge.
- Ekblad, S. (1993). Psychosocial adaptation of children while housed in a swedish refugee camp: Aftermath of the collapse of Yugoslavia. *Stress Medicine*, 9, 159-166.
- Erogul, M.S. and Rahman, A. (2017). The impact of family adjustment in expatriate success. *Journal of International Business Economy*, 18, 1-23.
- Evans, J. and Mavondo, F.T. (2002). Psychic distance and organizational performance: An empirical examination of international retailing operations. *Journal of International Business Studies*, 33, 515-532.
- Farh, C.I.C., Bartol, K.M., Shapiro, D.L. and Shin, J. (2010). Networking Abroad: A Process Model of How Expatriates Form Support Ties to Facilitate Adjustment. *Academy of management review*, 35, 434-454.
- Festing, M., Budhwar, P.S., Cascio, W., Dowling, P.J. and Scullion, H. (2013). Current issues in International HRM: Alternative forms of assignments, careers and talent management in a global context. *German Journal of Human Resource Management*, 27, 161-166.
- Finaccord. (2018). *Global expatriates: Size, segmentation and forecast for the worldwide market*[Online]. Finaccord. Available: http://www.finaccord.com/BlankSite/media/Catalog/Prospectus/report_prospectus_APG_GEP.pdf [Accessed 18 March 2020].
- Fitzpatrick, J.F. (2016). *Understanding culture shock; the adjustment of expatriate sojourners on international assignment*. Doctor of Philosophy, Newcastle University.
- Froese, F.J. and Peltokorpi, V. (2011). Cultural distance and expatriate job satisfaction. *International journal of intercultural relations*, 35, 49-60.
- Furnham, A. (2019). Culture Shock: A Review of the Literature for Practitioners. *Psychology*, 10, 1832.
- Gamble, K. and Hawker, D.M. (2019). *Expatriates: Corporate, Missionary, and Volunteer*. Travel Medicine. Elsevier.
- Hack-Polay, D. (2020). Global South expatriates, homesickness and adjustment approaches. *Public Health Rev*, 41, 11.
- Hack-Polay, D. and Mahmoud, A.B. (2020). Homesickness in developing world expatriates and coping strategies. *German Journal of Human Resource Management: Zeitschrift für Personalforschung* 2397002220952735.

- Harzing, A.W. and Christensen, C. (2004). Expatriate failure: time to abandon the concept? *Career Development International*, 9, 616-626.
- Harzing, A-W, Pudelko, M. & Reiche, S. (2015) The Bridging Role of Expatriates and Inpatriates in Knowledge Transfer in Multinational Corporations. *Human Resource Management*, 55(4) 679–695. <https://doi.org/10.1002/hrm.21681>
- Haslberger, A. and Brewster, C. (2008). The expatriate family: An international perspective. *Journal of managerial psychology*.
- Hatch, D.D. (2008). Leadership development and talent management. In: J. Storey, P.M. Wright and D.O. Ulrich (eds.) *The Routledge Companion to Strategic Human Resource Management*.
- Hays, R.D. (1974). Expatriate selection: Insuring success and avoiding failure. *Journal of International Business Studies*, 5, 25-37.
- Hodgetts, D. and Stolte, O. (2014). Social Distance. In: T. Teo (ed.) *Encyclopedia of Critical Psychology*. New York: Springer New York.
- Hollington, A., Salverda, T., Schwarz, T. and Tappe, O. (2015). Voices from around the world: Concepts of the Global South. Cologne, Germany: Global South Studies Center Cologne
- Horwitz, F., Budhwar, P. and Morley, M.J. (2015). Future trends in human resource management in emerging markets. In: F. Horwitz and P. Budhwar (eds.) *Handbook of human resource management in emerging markets*. Edward Elgar Publishing.
- Ikafa, I., Hack-Polay, D., Walker, J. and Mahmoud, A.B. (2020). African Migrants and Stress Coping Strategies in Australia: Implications for Social Work. *International Social Work*.
- IOM (2017). World Migration Report. New York.
- Johanson, J. and Vahlne, J.-E. (1977). The internationalization process of the firm—a model of knowledge development and increasing foreign market commitments. *Journal of International Business Studies*, 8, 23-32.
- Johnson, L. (2019). *World Mobility Perspectives: Big global mobility trends to watch in 2019*[Online]. Crown World Mobility's Consulting Group. Available: <https://www.crownworldmobility.com/wp-content/uploads/2019/02/Big-global-mobility-trends-to-watch-in-2019-CWM.pdf> [Accessed 30 March 2020].
- Katou, A.A. and Budhwar, P.S. (2006). Human resource management systems and organizational performance: a test of a mediating model in the Greek manufacturing context. *The International Journal of Human Resource Management*, 17, 1223-1253.
- Katou, A.A. and Budhwar, P.S. (2007). The effect of human resource management policies on organizational performance in Greek manufacturing firms. *Thunderbird International Business Review*, 49, 1-35.
- Khedher, H. and Asadullah, M. A. (2019). Role of social and organizational support in the adjustment of Tunisian self-initiated expatriates. *European Journal of Training Development*
- Latukha, M., Soyiri, J., Shagalkina, M. and Rysakova, L. (2019). From expatriation to global migration: The role of talent management practices in talent migration to Ghana. *Journal of Global Mobility*.
- Lin, K.-M. (1986). Psychopathology and social disruption in refugees. In: C.L. Williams and J. Westermeyer (eds.) *Refugee mental health in resettlement countries*. Washington, DC, US: Hemisphere Publishing Corp.
- McNulty, Y. and Brewster, C. (2019). *Working Internationally: Expatriation, Migration and Other Global Work*, Glos,

Edward Elgar Publishing.

- Mellahi, K. and Budhwar Pawan, S. (2010). Introduction: Islam and human resource management. *Personnel Review*, 39, 685-691.
- Mumford, D.B. (1998). The measurement of culture shock. *Soc Psychiatry Psychiatr Epidemiol*, 33, 149-154.
- Mutabazi, E. and Derr, C.B. (2017). Socometal: Rewarding African Workers. In: B. S. Reiche, G.K. Stahl, M.E. Mendenhall and G.R. Oddou (eds.) *Readings and Cases in International Human Resource Management*. New York: Routledge.
- Neiterman, E., Atanackovic, J., Covell, C. and Bourgeault, I.L. (2018). 'We want to be seen as partners, not vultures of the world:' perspectives of Canadian stakeholders on migration of international students studying in health professions in Canada. *Globalisation, Societies and Education*, 16, 395-408.
- Noman, M., Safdar Sial, M., Vianna Brugni, T., Hwang, J., Yaseen Bhutto, M. and Khanh, T.H.T. (2020). Determining the Challenges Encountered by Chinese Expatriates in Pakistan. *Sustainability*, 12, 1327.
- Nunes, I.M., Felix, B. and Prates, L.A. (2017). Cultural intelligence, cross-cultural adaptation and expatriate performance: a study with expatriates living in Brazil. *Revista de Administração*, 52, 219-232.
- OECD (2017). G20 Global Displacement and Migration Trends Report. Paris: OECD.
- OECD (2019). 2019 International Migration and Displacement Trends and Policies Report to the G20.
- Parker, B. and McEvoy, G.M. (1993). Initial examination of a model of intercultural adjustment. *International journal of intercultural relations*, 17, 355-379.
- Pires, G., Stanton, J. and Ostefeld, S. (2006). Improving expatriate adjustment and effectiveness in ethnically diverse countries: marketing insights. *Cross Cultural Management: An International Journal*.
- Reiche, B.S., Stahl, G.K., Mendenhall, M.E. and Oddou, G.R. (2017). *Readings and cases in international human resource management*, New York, Routledge.
- Rui, J.R. and Wang, H. (2015). Social network sites and international students' cross-cultural adaptation. *Computers in Human Behavior*, 49, 400-411.
- Sánchez-Zarza, D. and Saiz-Álvarez, J.M. (2014). Intellectual Expatriates and Their Intangible Value in Post-Industrial Globalized Societies. In: L. Brennan (ed.) *Enacting Globalization*. London: Palgrave Macmillan UK.
- Sarkiunaite, I. and Rocke, D. (2015). The expatriate experience: The factors of international assignment success. *Transformations in Business Economics*, 14, 20-47.
- Schiavone, F., Meles, A., Verdoliva, V. and Del Giudice, M. (2014). Does location in a science park really matter for firms' intellectual capital performance? *Journal of Intellectual Capital*, 15, 497-515.
- Shenkar, O., Luo, Y. and Yeheskel, O. (2008). From "distance" to "friction": Substituting metaphors and redirecting intercultural research. *Academy of management review*, 33, 905-923.
- Sims, R.H. and Schraeder, M. (2004). An Examination of Salient Factors Affecting Expatriate Culture Shock. *Journal of Business Management*, 10.
- Stroebe, M., Schut, H. and Nauta, M. (2015). Homesickness: A Systematic Review of the Scientific Literature. *Review of General Psychology*, 19, 157-171.
- Tarique, I., Briscoe, D.R. and Schuler, R.S. (2016). *International Human Resource Management: Policies and Practices*

for Multinational Enterprises, Oxon, Routledge.

- Templier, M. and Paré, G. (2015). A framework for guiding and evaluating literature reviews. *Communications of the Association for Information Systems*, 37, 6.
- Thite, M., Budhwar, P. and Wilkinson, A. (2014). Global HR Roles and Factors Influencing Their Development: Evidence From Emerging Indian IT Services Multinationals. *Human Resource Management*, 53, 921-946.
- Tregaskis, O. and Brewster, C. (2006). Converging or diverging? A comparative analysis of trends in contingent employment practice in Europe over a decade. *Journal of International Business Studies*, 37, 111-126.
- Van Erp, K.J.P.M., Giebels, E., Van Der Zee, K.I. and Van Duijn, M.A.J. (2011). Expatriate adjustment: The role of justice and conflict in intimate relationships. *Personal relationships*, 18, 58-78.
- Wang, C.-H. and Varma, A. (2017). Cultural distance and expatriate failure rates: the moderating role of expatriate management practices. *The International Journal of Human Resource Management*, 30, 2211-2230.
- Weissman, M.M. and Paykel, E.S. (1972). Moving and depression in women. *Society*, 9, 24-28.
- Wolfgang, M., Astrid, R. and Paul, S. (2012). Alternative Forms of International Working. In: G.K. Stahl, I. Björkman and S. Morris (eds.) *Handbook of Research in International Human Resource Management*. Cheltenham, UK: Edward Elgar Publishing.