

Leadership Challenges Facing South African Expatriates Working in Africa

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ABSTRACT

The increasing trend of globalisation has implications for companies wanting to do international business as well as for their global talent management approach. As greater interest concentrates on doing business in developing countries, research into leadership challenges associated with this comes under the spot-light as a priority. For this qualitative study fourteen (14) semi-structured interviews were conducted, the findings of which have been categorised into ten (10) interdependent and multi-dimensional themes, covering both personal and professional challenges, thus demanding an integrated and multi-dimensional approach to addressing them. To this end, fifteen (15) recommendations have been proposed to holistically address these leadership challenges, in the form of the proposed “*Who-What-How-WOW!*” integrated response framework, which, in keeping with the principles of African leadership, prioritises partnerships and collaboration. This study can help different stakeholders better understand their roles in addressing the leadership challenges of South African expatriates working in Africa. This study has also revealed a lack of current research and information to help South African expatriates adjust personally and professionally in other countries in Africa. More research is thus required such that, going forward, it makes a meaningful difference to addressing the leadership challenges facing South African expatriates working in Africa thereby improving their overall experience.

Key Words: globalisation, leadership, leader effectiveness, Ubuntu, Indaba, expatriate, cross-cultural training (CCT), cultural intelligence (CQ), cultural sensitivity, culture shock, perceived organizational commitment (POC), skills transfer, spousal adjustment

DECLARATION

I, Natasha Jayshree John, declare that this research report is my own work except as indicated in the references and acknowledgements. It is submitted in partial fulfilment of the requirements for the degree of Master of Business Administration in the University of the Witwatersrand, Johannesburg. It has not been submitted before for any degree or examination in this or any other university.

Natasha Jayshree John

Signed at

On the day of 2013

DEDICATION

This research report is dedicated with love and gratitude to my parents, Mr Samuel Eric Vedanayagam John and Doctor Vijjalakshmi John, for the nature (genetic wiring) and nurture (enabling environment), that has provided a firm foundation from which I have grown and thrived.

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CHAPTER 1: INTRODUCTION

1.1 Purpose of the study

The purpose of this research was to investigate the leadership challenges facing South African expatriates working in Africa. Based on the fourteen (14) semi-structured interviews conducted, qualitative thematic analysis was used to develop a set of ten (10) core themes covering these leadership challenges from a personal and professional perspective. Recommendations based on current research and literature and the report findings, are provided in the form of an integrated, multi-dimensional response strategy for different critical stakeholders, to enhance the overall expatriate experience of South African leaders working in Africa.

1.2 Context of the study

Alignment of thought prevails amongst researchers and writers, such as Grinstein & Wathieu (2012), Hill (2011), Collings, Scullion and Morley (2007), Pires, Stanton, & Ostefeld (2006) and Harrison & Shaffer (2005) who concur that the past few decades has witnessed a fundamental shift in the world economy towards globalisation and an increase in international assignments. The phenomenon of globalisation has seen the merging of traditionally distinct markets across the world into what Hill (2011, p. 6) calls, “one huge global marketplace”. However he stresses that despite the prevalence of big global brands such as McDonalds and Starbucks, it does not necessary imply that national markets are falling away in favour of global markets and goes on to elaborate on different dimensions pertinent to distinguishing national from global markets; such as, inter alia, business systems, legal regulations and culturally embedded value systems. The implications for companies wanting to pursue business within such distinctive national markets is grounded in acknowledging the need for a different approach to operations, marketing strategies and product design and customisation (Hill, 2011).

Van der Heijden, Van Engen & Paauwe (2009) emphasise that as globalisation increases, so too does the number of employees sent on expatriate assignments, an argument supported by Grinstein and Wathieu (2012, p. 5) who argue that expatriation is a “dramatically increasing phenomenon”. However, as important as international assignments may be to companies, the expatriate experience is not without its challenges. Collings, et al. (2007) argue that many MNC’s (multi-national companies) tend to underestimate the challenges involved in global staffing and talent management. Pires, Stanton, & Ostenfeld (2006) point out that even though international assignments are both a strategic and operational priority for many companies, the rate of expatriate assignment failures continue and argue that at the heart of unsuccessful expatriate experiences lies inadequate adaptation to unfamiliar and foreign environments. Harrison & Shaffer (2005) support this and provide a model of expatriate success (Figure 1) demonstrating how psychological adaption influences efforts expatriates put into their assignments, which in turn impacts on job performance. This is reflected in the figure below:

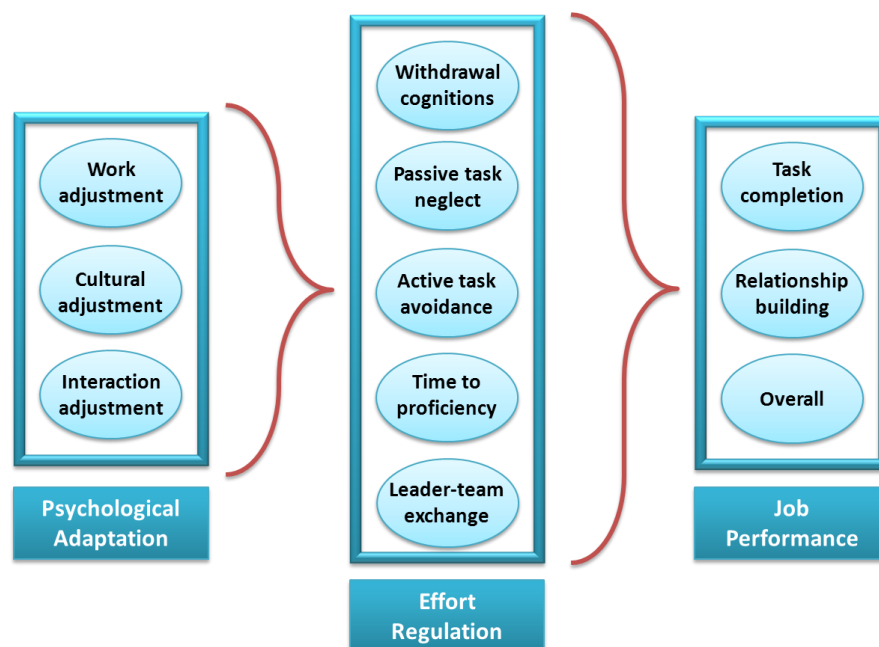


Figure 1: Model of expatriate success (Harrison & Shaffer, 2005)

Globalisation and international assignments are not just restricted to the domain of developed nations. Akokpari (2006) argues that African states

have been encouraged to align their politics and policies with the principles of globalisation and Keller (2007) argues that over the past fifty years, Africa has undergone significant change and is now prized for its natural resources and potential goods markets. He goes on to suggest that a fundamental challenge for African nations is to become effective players in what he calls, the “globalisation game” (Keller, 2007, p. 51).

The implications for leadership development and adjustment within these environments are thus profound; issues of cultural integration and communication barriers may present challenges to leaders in terms of their personal adjustment and their ability to successfully mobilise and motivate people and teams to execute deliverables successfully on assignment. Baicher (2005) argues that South African business leaders are faced with several challenges for instance globalisation, cultural diversity, black economic empowerment and transformation which require innovative thinking, new and improved approaches and enhanced leadership competencies to address and manage them.

With Africa’s increasing role in international trade, the ability of leaders to cope with these challenges comes under the spotlight; Nkomo & Ngambi (2009) argue that studies on leadership and management within the African context is limited. In his discussion on the perceptions of leadership in Africa, Smit (2010, p. 16) makes reference to the important leadership attributes of Ubuntu, where traditionally, leaders play the role of servers (not commanders), advocating, “consultation, persuasion, accommodation and cohabitation” and shunning “coercion and domination”. However Keller (2007) suggests that the colonial history of Africa has produced many carbon copies of the colonial era. Mathur-Helm (2002, p. 19) states that the ability for expatriates to succeed whilst on cross-border assignments “may be hampered by cultural and environmental conditions”. It is hoped that this study of leaders from South African companies working in Africa will contribute to the body of research of what their leadership challenges are and how these could possibly be addressed.

1.3 Problem statement

1.3.1 Main problem

The main research problem was to investigate and interpret the leadership challenges facing South African expatriates working in Africa and to provide recommendations to support and enhance their expatriate experiences going forward.

1.4 Significance of the study

Globally, much time and energy has been spent, investigating expatriate experiences. Consequently, with the ever increasing focus on economic globalisation and opportunities for companies to expand their operations into Africa, one would expect there to be a plethora of information detailing expatriate's experiences of leaders working in Africa. Unfortunately, this area of research remains limited, more so, specifically the experience of South African leaders working in Africa. This research attempts to bridge this gap in the literature. Thus this study benefits not just leaders in South African companies who have upcoming work assignments in Africa, but those expatriates already in the field.

Importantly, this research has value for South African organisations by enabling a greater appreciation for the challenges faced by expatriates in the field. Therefore it also benefits those leaders based at head-office in South African Multi-National Companies (MNC's) who may be managing or interfacing with expatriates working on the African continent, thereby contributing to the body of knowledge around this topic.

This research could also contribute to improved business operations and human capital management of South African companies across the African continent. Human Resources (HR) practitioners, who support these Leaders during the course of their African work assignments, can also benefit from acquiring and expanding their knowledge on how best to

design customised, fit-for-purpose interventions to support leaders during this experience, both on a personal and professional level.

Furthermore the research may also enable Host Country Nationals (HCN's) based at South African MNC's in other African countries, to understand the leadership challenges faced by South African expatriates. In so doing, the research could also assist HCN's to better support the adjustment of their expatriate colleagues.

Finally, the research will also benefit those spouses and families of South African expatriates working in Africa, to appreciate the challenges facing their family member, such that they may be able to understand their critical role in how best to support the overall adjustment process. The research will also benefit spouses and families of South African expatriates working in Africa, to understand that their own challenges may not be unique to them, and that they may obtain insight and learn from the experiences of others.

1.5 Delimitations of the study

This study focuses on South African employed expatriates who have worked (or who are currently working) in a leadership role on the African continent. The study does not focus on self-employed individuals.

Given the limitations of the sample size for this research report (fourteen respondents in total), it was not possible to draw specific conclusions about all the different countries that make up the diverse African continent; instead, over-arching trends have been synthesised based on the experiences shared by respondents.

The study did not adopt a longitudinal approach using previous research, that is, the research has not continued where other research has left off. The research is a new contribution to the field of study, and had made reference to research and literature around the topic.

The research conducted with the fourteen respondents is not intended for future longitudinal trend analysis. Only current perceptions around leadership challenges facing South African expatriates have formed the core of the study undertaken.

The study focuses on respondents with a minimum of three months experience; respondents who have worked as a South African expatriate to Africa with less than three months experienced have not been considered.

The study focuses on respondents who have had a three (3) year minimum gap from their last assignment to the time of interview. This criterion helped to ensure a degree of relevance for current challenges.

The study has not specifically focussed on certain regions in Africa, for instance, North Africa, West Africa, East Africa or sub-Saharan Africa. Instead, respondents were asked to share experiences from all the different African countries they worked in, irrespective of geographical region

1.6 Definition of terms and abbreviations

- Multi-national company (MNC): (Hill, 2011)
- Host-country nationals (HCN's): (Mahajan & De Silva, 2012)
- Cross-cultural training (CCT): (Okpara & Kabongo, 2011)
- Cultural Intelligence (CQ): (Lin, Chen, & Song, 2012)
- Emotional Intelligence (EQ): (Lin, et al., 2012)
- Perceived Organisational Commitment (POC): (Liu, 2009)
- Expatriate: (van der Heijden, et al., 2009)

1.7 Assumptions

The following assumptions have been made regarding the study:

- The sample of respondents have had working experience in South Africa and on the African continent (in some leadership capacity) for a minimum of three months and were able to share information on their experiences and challenges.
- The total number of respondents was sufficient to gain adequate data.
- Individual perspectives on the research problem have been conveyed honestly and with integrity by the respondents; dishonesty and false data could have had a detrimental effect on the study results.
- The sample size for this qualitative research undertaking was appropriate and representative of the population; non-representative views could compromise validity of results.
- The research respondents would be guaranteed anonymity, due to the sensitive nature of the information that may arise; if not done, this could compromise the willingness of the respondents to openly share information, thereby compromising the richness of data provided and hence the overall quality of the research.

CHAPTER 2: LITERATURE REVIEW

2.1. Introduction

In attempting to shed light on the leadership challenges facing South African expatriates working in Africa, the literature review begins by briefly commenting on the impact of globalisation on international business and the implications for companies, including inter alia, their human resourcing and global talent strategies. Thereafter, some definitions of leadership are provided followed by an overview of some of the different leadership paradigms and trends, with a focus on those trends applicable to global talent management. This will be followed by an in-depth discussion of the literature around the leadership challenges typically experienced by expatriates.

The chapter then shifts focus to discussion of the uniqueness of doing business in Africa and circles back to the earlier discussion on leadership challenges, only this time with a more specific focus on the challenges of expatriate leaders working in Africa; before finally commenting on the available (though limited) literature on the leadership challenges faced by South African expatriates working in Africa.

The following concepts will be useful to have an understanding of, when reading this literature review, namely, globalisation, leadership, expatriate, culture-shock, Ubuntu, Indaba, cross-cultural training, cultural intelligence, oral deprivation and pre-departure on-boarding; each will be explained in the relevant sub-sections of the chapter.

This research is hoped to inform and enhance the emerging and limited body of literature on the leadership challenges facing South African expatriates working on the rest of the African continent.

2.2. Background discussion

According to Zhuang, Wu & Wen (2012), globalisation has become a permanent fixture in today's business environment. Hill (2011, p. 6) defines globalisation as the "shift towards a more integrated and interdependent world economy" and describes the process of globalisation as the increasing "move away from self-contained economies" (which presented several barriers to cross-border trade and investment and cross-cultural integration) to a world in which advances in transport and telecommunications have enabled national economies to merge into an "interdependent, integrated global economic system". Interestingly, in their discussion on culture and globalisation Chiu & Cheng (2007) suggest that globalisation has brought symbols of different cultures together.

As globalisation increases and in so doing creates new opportunities for market penetration and expansion strategies, companies are discovering that they have to pay close attention to how they manage their operations across borders in order to maintain a competitive advantage. Earley & Erez (1997) comments that in the age of business globalisation, managers find themselves frequently having to function in new work environments.

Dickmann & Harris (2005, p. 399) make the point that one of the key priorities for such companies would be to "develop leaders who can manage the increasing complexity of running global organisations". Hill (2011, p. 613) emphasises the criticality of these managers having a "global mind-set" and Avery (2007, p. 6) emphasises that increasing diversity among people, cultures and nations as a result of globalisation impacts on how organisations do business.

2.3. Leadership challenges of expatriates working in Africa

2.3.1. *Towards a definition of leadership and expatriates*

Cummings & Worley (2009, p. 751) define leadership as, “a process of influence exercised when institutional, political, psychological, and other resources are used to arouse, engage, and satisfy the motives of followers”. In her book, “Understanding Leadership” Avery (2007, p. 7) puts forward a view that it is difficult to pin down an exact agreed definition of leadership, and emphasises the importance of having social perspective; she stresses that for a definition of leadership to be effective, it would need to be able to adapt to changing circumstances and be sufficiently “comprehensive and integrated”. According to Khoza (2011) and Smit (2010), Ubuntu is a traditional African leadership practice focused on collectivism and sense of community.

Harvard Business School Press, in their review on the tests of a leader (2007), concur on the importance of maintaining perspective and acknowledges that leaders are periodically challenged during their careers; the expatriate experience is one such occasion. Gupta & Dasari (2012, p. 7) define expatriates as, “people who move across national border(s) to another country to pursue their professional, economic and financial goals”; Hill (2011, p. 683) defines an expatriate as “a citizen of one country working in another country”. Huang, Chi & Lawler (2005, p. 1656) argue that expatriates represent a “potential competitive advantage for multinational corporations”. According to Mathur-Helm (2002) cultural and environmental issues influence expatriate success on cross-border assignments. With regards to leadership within an African context and the increasing spotlight on Africa, Nkomo & Ngambi (2009) argue that despite the importance of understanding more about leadership and management within an African context, the availability of such studies is limited.

2.3.2. Overview of Leadership paradigms and trends

In motivating for her belief that it is difficult to pin down an exact agreed definition of leadership, one of the reasons provided by Avery (2007) is that underlying concepts of leadership have been modified over time. Hence her emphasis on keeping a healthy perspective when examining issues of leadership. She argues that with the rapid speed of change faced by organisations, the challenge for leadership is to adapt and operate within their changing environments, which she suggests, requires a “re-think of paradigms of leadership” (Avery, 2007, p. 5).

Nevertheless, to find common ground from which to engage meaningfully on the issue of leadership, she offers a set of four leadership paradigms, representing different broad sets of ideas around leadership. These leadership paradigms are presented below, including a brief description of each, their primary basis of leadership, the source of follower commitment and their approach to vision.

Table 1: Leadership Paradigms (Avery, 2007)

Leadership Paradigms				
Leadership characteristic	Classical	Transactional	Visionary	Organic
Major era	<i>Antiquity – 1970's</i>	<i>1970's – mid 1980's</i>	<i>Mid 1980's - 2000</i>	<i>Beyond 2000</i>
Basis of Leadership	Leader dominance through respect and/or power to command and control	Interpersonal influence over and consideration of followers. Creating appropriate management environments	Emotion – leader inspires followers	Mutual sense-making within the group. Leaders may emerge rather than be formally appointed
Source of follower commitment	Fear or respect of leader. Obtaining rewards or avoiding punishment	Negotiated rewards, agreements and expectations	Sharing the vision; leader charisma may be involved; individualized consideration	Buy in to the group's shared values and processes; self-determination
Vision	Leader's vision is unnecessary for follower compliance	Vision is not necessary and may not ever be articulated	Vision is central. Followers may contribute to leader's vision	Vision emerges from the group; vision is a strong cultural element

Avery (2007) suggests that leaders may lean towards a specific paradigm as a result of their mind-sets and beliefs, which may be influenced by the systems and organisational culture within which they operate. An example of this may be the norms within a patriarchal ideology that may demonstrate reluctance for a mind-set shift regarding the increasing value of more feminine behaviour traits (such as helping and developing people and focusing on relationship building).

However Avery (2007) also argues that ideas around leadership have to change as organisations move to adopting different operating models; this is prevalent where globalisation results in increased fragmentation of the workforce, which demands new practices of managing and leading people and teams, given the cultural and logistical nuances that exist in globally diverse environments. She advocates that in order to have a comprehensive and complete understanding of leadership, one must first acknowledge that “leadership concepts apply within a particular social context and can vary with place and time”(Avery, 2007, p. 5).

This is closely aligned to the philosophy and classic model of Situational Leadership, which encourages leaders to consciously manage their behaviour towards employees, based on a diagnosis of their competence and commitment levels and their associated development needs as it pertains to specific tasks; Blanchard often famously talks about using, “different strokes for different folks” and, “different strokes for the same folks, depending on the goal or task” (Blanchard, Zigarmi, & Zigarmi, 1985). In this way of managing and leading others, leaders would have to be conscious that their leadership style is contextually appropriate.

The Situational Leadership model (SLii) is highlighted in the figure below:

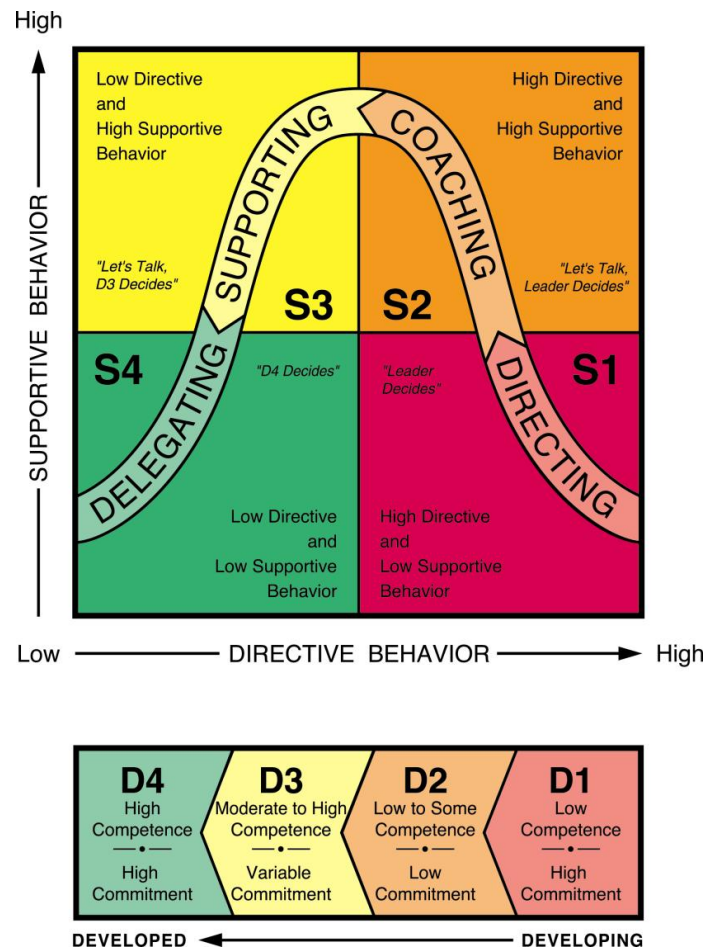


Figure 2: Situational Leadership model (Blanchard, et al., 1985)

Hughes, Ginnett, & Curphy (2009, p. 24) support this context-specific approach to leadership; they argue that leadership depends on other factors, over and above the characteristics of the leader, including the environment leaders find themselves in and their followers. They stress that to examine leaders in isolation of these influencing factors, would limit an understanding of the complexities of the leadership process and the interaction between leader, situation (environment) and followers.

The practice of Adaptive Leadership, as advocated and presented by Heifetz, Grashow, & Linsky (2009), also lends support for effective leadership being context dependent, a particularly useful approach, considering the rapid pace of change facing organisations operating in a global environment. They argue that the emergence of Adaptive Leadership is as a result of the efforts to practically understand the relationships and interdependencies between leadership, systems and

change and has its roots in the theory of evolution where species have to practice adaptation in order to survive and thrive.

Any review of leadership paradigms and trends relevant to the research topic would not be complete without insight into a leadership approach from an African perspective, namely Ubuntu, which is fundamentally about “humaneness” and differs significantly from Western philosophies (as seen in the Classical leadership paradigm in Table 1). Desmond Tutu¹ explains the concept of Ubuntu by stating that, “Ubuntu is very difficult to render into a Western language... It is to say, 'My humanity is caught up, is inextricably bound up, in what is yours.' (Tutu, Enright, & North, 1998). In her article on Nelson Mandela and the Power of Ubuntu, Oppenheim (2012, p. 369) reflects that the word Ubuntu comes from the Xhosa/Zulu culture, and has been summarised in the Nguni² phrase, “Umntu ngumuntu ngabantu”, translated as, “A person is a person through other persons” or, “I am because we are”.

According to Littrell, et al. (2013, p. 236) the concept of Ubuntu embraces “a spirit of caring and community”. They argue that group solidarity and relationship building are corner-stones of African values, embraced across Africa that define how people think and interact with one-another. This is supported by Newenham-Kahindi (2009, p. 92) who states that, “the largest tribe in Tanzania, the Sukuma, uses the word ‘Bantu’; the Zulu tribe in South Africa uses ‘Abantu’; Sesuto people in Southern Africa use ‘Batho’; the Herero people in Namibia use ‘Avandu’; in central Africa, it is ‘Ngumtu’, ‘Kubuntu’, and ‘Edubuntu’; and the Swahili people in East Africa use it as ‘Watu’, again implying togetherness or people as being together.”

Similar views regarding Ubuntu were shared by Bangura (2005) who argues that Ubuntu is the spiritual foundation of sub-Saharan societies. Recently Horwitz (2012), in agreement with Khoza (2011), contended that

¹ Desmond Mpilo Tutu is a South African social rights activist and retired Anglican bishop who rose to worldwide fame during the 1980s as an opponent of apartheid (Google Definition, 2013)

² The Nguni languages are a group of Bantu languages spoken in southern Africa by the Nguni people (Google Definition, 2013)

when Ubuntu was applied to leadership of people, individuals were not seen in isolation, but rather as part of a bigger community, a view shared by Newenham-Kahindi (2009) who argues that Ubuntu is anchored in group solidarity and relationship building; cornerstones of African management and leadership principles.

Related to the African leadership philosophy of Ubuntu, is Robert Greenleaf's theory of Servant Leadership, where person-oriented leaders prioritise the serving and development of others (Greenleaf & Spears, 2002). In his recent review of servant leadership, Van Dierendonck unpacks Greenleaf's ten (10) characteristics that define a servant leader; namely, "(1) listening, emphasising the importance of communication and seeking to identify the will of the people; (2) empathy, understanding others and accepting how and what they are; (3) healing, the ability to help make whole; (4) awareness, being awake; (5) persuasion, seeking to influence others relying on arguments not on positional power; (6) conceptualisation, thinking beyond the present-day need and stretching it into a possible future; (7) foresight, foreseeing outcomes of situations and working with intuition, (8) stewardship, holding something in trust and serving the needs of others; (9) commitment to the growth of people, nurturing the personal, professional, and spiritual growth of others; (10) building community, emphasising that local communities are essential in a persons' life." (Van Dierendonck, 2011, p. 1232). These characteristics are closely linked with the principles of Ubuntu.

Apart from the concept of Ubuntu, Newenham-Kahindi (2009) also believes that the concept of Indaba, (based on communalism, collective decision making and conflict resolution) permeates African behaviour and culture, with implications for people management and decision making. According to Newenham-Kahindi (2009, p. 92), "The term *Indaba* refers to a traditional social structure of handling and resolving debate or conflict that may arise within a group" and is generally demonstrated by leadership of elders within the community encouraging groups to resolve problems and conflicts together; thus emphasising inclusivity and collectivism.

2.3.3. *Leadership challenges of the expatriate experience*

Jokinen, Brewster, & Suutari (2008, p. 979) use the term “boundary-less careers” to describe the expatriate experience. Gupta & Dasari (2012, p. 8) state that organisations have progressed from relying on exclusively local workforces to, “integrating professionals from diverse geographies with varied expertise, perspectives and skill sets”. Kraimer, Shaffer, & Bolino (2009, p. 27) argue that globalisation has seen employees with global management skills, “becoming a critical competitive resource for international firms”, which is supported by Grinstein & Wathieu (2012, p. 5) who argue that expatriation is a “dramatically increasing phenomenon”, in which expatriates have a significant impact on the global economy. However the expatriate experience is not without its challenges.

One such challenge is discussed by Okpara & Kabongo (2011) who argue that MNC’s are experiencing retention challenges with their expatriate employees and state that between 10-80% of expatriates return home prematurely. Hill (2011, p. 609) refers to the premature return of an expatriate as “expatriate failure” and offers support for these statistics, only he distinguishes between expatriate failure in developed and developing nations; failure rates were significantly higher in developing nations (up to 70% as compared to 16-40% for developed nations). According to Hill (2011) and Okpara & Kabongo (2011), the main reason for this was failure of expatriates and their spouses to adjust to the new environment.

Gupta, Banerjee, & Gaur (2012b) acknowledge the sentiments from Andreason (2008), indicating the influential role of the spouse in expatriates’ decisions to quit their assignments, and argue that despite this, the research into expatriate failure has continued to focus primarily on expatriates per se, with less emphasis exploring the issue and challenges from the perspective of spouses. According to Gupta, Banerjee, & Gaur (2012a, p. 5), “A spouse can have a strong influence on their partner’s decisions to quit the assignment.” Andreason (2008), Vogel & Van Vuuren (2008) and Avril & Magnini (2007) argue that expatriate failure may be

mitigated with the right preparation, training and support for both expatriate and their families.

Annually over the past four years, HSBC³ have run their Annual Expat Explorer Survey (an on-line global survey), with the objective of providing insights into experiences, issues, and challenges of expatriates (HSBC, 2012). In the 2011 survey, 5339 expats participated from around the world, representing over 100 countries.

Of interest to note is the lack of information in HSBC's high-level report on the experiences and perspectives of expatriates in developing countries; instead the report has a predominant focus on expatriates from developed countries. It may be argued that, even though an independent body⁴ was used by HSBC to conduct the survey, the manner of accessing global respondents to encourage their participation may have been biased in a number of ways, such as in favour of those countries where HSBC has a large footprint or in favour of those countries that have the technical infrastructure in place to enable access and participation.⁵ It may be further argued that developing countries do not have access to the same quality of technical infrastructure as do developed countries, thus possibly explaining the absence of information from developing countries in the high-level league reports.

One of the main survey dimensions focuses on assessing expatriates' quality of life, including family adjustment and integration into host country life and culture. A detailed table containing information from all countries with a sample size greater than thirty (30) is located in Appendix G. An extract of this information is presented in the table below. Perhaps not surprisingly, The Cayman Islands came out on top as the best overall experience for expatriates (HSBC, 2012).

³ HSBC Holdings plc (commonly known as HSBC) is British multinational banking and financial services company (Google Definition, 2013)

⁴ The survey was commissioned by HSBC and conducted by an YouGov, a third party research company

⁵ The survey was hosted on-line as well as facilitated through other media and social networking channels

Table 2: Extract from HSBC Expat Explorer Report (HSBC, 2012)

Country	Overall Quality of Life	Overall Integration	Overall Experience
Caymen Islands	1	7	1
Thailand	2	10	2
Spain	3	1	3
South Africa	8	25	9
China	22	17	22

A number of factors impact the ability of expatriates and their spouses to adjust in foreign countries; Gupta, et al., (2012a, p. 1) suggest “cultural novelty, family and peer support, organisational support and the spouse’s personality” as key factors influencing the spouses ability to adapt. Based on their research with twenty-six (26) Indian spouses of expatriates, Gupta, et al. (2012b) propose an extension to the model of factors influencing spousal adjustment originally proposed in 2005 by Konopaske, Robie, & Ivancevich, (2005).

Their model contains a more comprehensive set of factors affecting spousal adjustment and the impact on expatriates’ willingness to take on and complete assignments, such as spouse personality, demographic factors, pre-departure training, time duration of assignment and perception of the marital bond into account, and is aligned to the research from Hill (2011), Okpara & Kabongo (2011), El Mansour & Wood (2010), Avril & Magnini (2007) and Pires, et al. (2006); their revised model is presented in the figure below.

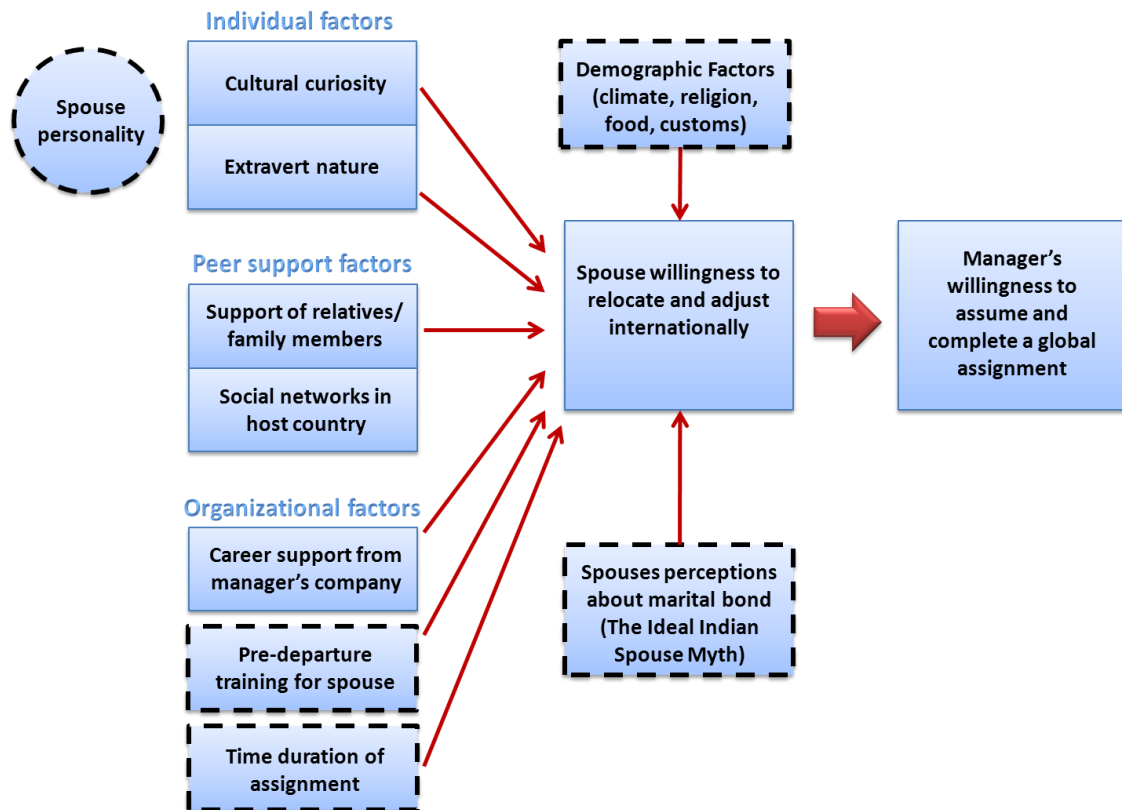


Figure 3: Factors affecting Spouse Adjustment (Gupta, et al., 2012)

Sussman (2011) and Avril (2007) argue that spouses have a more challenging and prolonged adjustment phase than expatriates; for Sussman, this was due to lack of organisational and host country support, while Avril is of the view that a diminished sense of belonging accompanied by feelings of alienation in the host country created a struggle for expatriate spouses. When taken into account with the above model on the factors affecting spousal adjustment in host countries and the subsequent impact this is likely to have on expatriates' willingness to assume and complete assignments, it is clear that spousal adjustment has a major impact on expatriate success or failure.

With symptoms ranging from emotional instability, confusion, depression, stress, aggression and feelings of helplessness, many researchers including Sussman (2011) Thomas & Schroll-Machl (2010), Avril & Magnini (2007), Collings, et al. (2007) and Pires, et al.(2006) describe the initial reaction of both expatriates and their spouses to being in a foreign

country as culture shock. According to Sussman, (2011, p. 403) this is triggered by, “the loss of familiar cues, interpersonal synchrony, support networks, language, food and customs”. Thomas & Schroll-Machl (2010, p. 345), describe culture shock as, “a form of emotional disorientation caused by a constant confrontation with unexpected and unfamiliar reactions in the new setting, a feeling of being misunderstood, and no longer knowing how to act appropriately.”

When discussing culture shock and the expatriate personal transformation and adjustment process, Pires, et al. (2006) acknowledges the research of Lysgaand (1955) in the 1950’s for introducing the U-curve framework to demonstrate the process of expatriate cultural adjustment over time within a host country, in which four phases of the expatriate adjustment process were conceptualised; namely, honeymoon, culture shock, adjustment and mastering. Essentially, these phases cover the processes of change and transformation that expatriates, their spouses and their families experience over time, as they adjust to new foreign environments and host countries.

In discussing the U-curve of expatriate adjustment, Pires, et al.(2006) provides an alternative perspective on the model, by adding greater granularity to Lysgaand’s four phases; they plot seven additional milestones along the expatriate (and spousal) adjustment U-Curve; namely unreality, fantasia, interest, acceptance of reality, experimentation, search, and integration. These are presented in the model below.

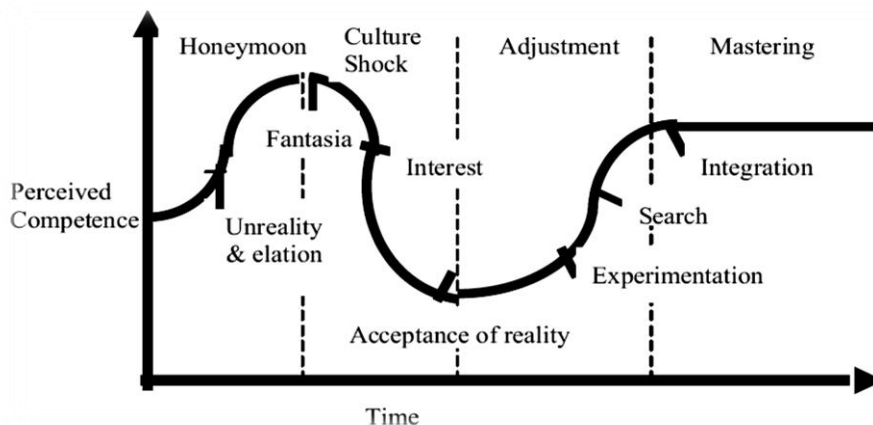


Figure 4: Alternate perspective on the U-Curve (Pires, et al., 2006)

The U-Curve of Lysgaard (1955) and the alternative perspective offered by Pires, et al. (2006) is closely aligned to the principles of change management, with particular emphasis on personal transformation. However, while this model of expatriate adjustment and transformation remains popular, Pires, et al. (2006) acknowledges that it has been criticised by some researchers, who have discovered that far from experiencing a honeymoon phase, expatriates (and their spouses) actually experience a sense of loss and depression at the beginning of their assignments, from which they work towards acknowledgement and acceptance over time. This approach is more closely aligned to the Inter Change Cycle, an old, but popular personal transformation model presented in the book of the same title by Brock & Salerno (1994) ; a copy of the Inter Change Cycle may be found in the Appendix F.

Apart from expatriate and spousal adjustment challenges, Hill (2011) argues that expatriate failure rate is also a consequence of inappropriate expatriate selection processes, where companies assume superior domestic performance to be a predictor of similar international performance. Also companies tend to favour technical expertise, overlooking “cross-cultural fluency” in expatriate selection (Hill, 2011, p. 613). Hill’s argument supports Avril & Magnini (2007), Pires, et al. (2006) and Graf (2004) who all agree that inappropriate expatriate selection processes, coupled with the lack of effective training for both spouse and expatriate, presents significant challenges to adjustment, consequently compromising expatriate success.

Advocating the importance of a holistic approach to expatriate selection and training, Avril & Magnini (2007) emphasises the importance of considering variables other than technical expertise in the process, such as the expatriates’ family status, and emotional intelligence, which they argue is an important pre-requisite for successful cross-cultural adjustment. Avril & Magnini (2007) go on to discuss the psychological and personality traits associated with emotional intelligence, necessary for cross-cultural adjustment; these include inter alia, tolerance for ambiguity,

tolerance for diversity, empathy, curiosity, self-reliance and flexibility. An interesting point to note is that Avril & Magnini (2007) strongly encourage companies to involve expatriates' families in the selection process, notwithstanding the legal implications this involves.

Another interesting point from the literature was the concept of cultural intelligence (CQ), as an important consideration in the expatriate selection process, in addition to emotional intelligence (EQ) and technical intelligence (IQ). Research conducted by Lin, Chen, & Song (2012) found a positive relationship between CQ and EQ in enabling improved cross-cultural adjustment of expatriates. The importance of CQ as an enabler of cross-cultural adaptation was also emphasised by Koo Moon, Kwon Choi, & Shik Jung (2012) and Groves & Feyerherm (2011, p. 535) who argue that, "leader CQ predicted follower perceptions of leader performance and team performance on culturally diverse work teams, beyond the effects of leader emotional intelligence and other leadership competencies".

The issue of training, in particular cross-cultural training (CCT), has been strongly advocated as a factor in enabling expatriate success. Okpara & Kabongo (2011) and El Mansour & Wood (2010) suggest that the challenge of enabling expatriates to function in global locations, has given rise to cross-cultural training. Hill (2011), Herman & Tetrick (2009), Avril & Magnini (2007) Pires, et al. (2006) and Graf (2004) also champion the case for cultural and language training; they believe that this will enable expatriates to better adjust to their host country.

Holopainen & Björkman (2005, p. 42) argue that cross-cultural training, "provides the expatriate with information on the host country and helps the expatriate to form realistic expectations" thereby reducing uncertainty and facilitating improved adjustment. They go on to caution companies about the manner in which these programmes are executed, and that a short and superficial pre-departure training and on-boarding programme may in fact, do more harm than good, in managing expectations of expatriates and assisting with their adjustment in host countries. Ironically Horwitz (2012)

comments that in certain cases, despite having the best intentions, these programmes serve to perpetuate stereotypes about Africa.

According to Kuo (2012), Okpara & Kabongo (2011), Avril & Magnini (2007) and Pires, et al. (2006), an effective cross-cultural training programme for expatriates and their families is critical for successful international operations. Kuo (2012) argues that cross-cultural training, “is an effective strategy in the achievement of organisational performance targets and multicultural policy objectives”. Avril & Magnini (2007) advise that the bare minimum of these programmes should include coaching in, “business culture, etiquette, inter-personal communication and conflict resolution”. They go further to suggest that a once-off programme is insufficient to adequately train expatriates and that an effective cross-cultural training programme should consist of a three phased approach, namely, training in the home country, training upon arrival in the host country and real-time on-the-job training (Avril & Magnini, 2007).

While closely linked to cross-cultural adjustment, the challenge of language and communication barriers must be elevated due to its fundamental impact on expatriate success. According to Hack-Polay (2012), the experiences of expatriates have, “demonstrated that language is a critical survival tool in a new culture and society”. Pires, et al. (2006, p. 163) support that culture and language barriers (or, “oral pleasure deficiencies”) are the main contributors to adjustment challenges experienced by expatriates.

Another interesting dimension to the discussion on language and communication barriers was provided by Hill (2011, p. 614), who comments that even though English may be the officially recognised international business language in many countries, the challenge faced by expatriates is, where “an exclusive reliance on English diminishes an expatriate manager’s ability to interact with host-country nationals”, thereby posing challenges for relationship building and networking.

Linked to the challenge of communication barriers is the leadership challenge of knowledge transfer (not an easy task where communication is a barrier). The literature pertaining to skills transfer and the role of expatriates is most interesting. Wang, et al. (2009) suggest that expatriates with specific competencies that can transfer both explicit and tacit knowledge, can provide firms with a distinct competitive advantage.

According to Change, Gong, & Peng (2012) and Choi & Johanson (2012) and Wang, Tong, Chen & Kim (2009), MNC's use expatriates to transfer knowledge from company headquarters to subsidiaries, to enhance subsidiary performance. They caution however, that due to the expatriate selection process, often based on technical merit, expatriates may not be equipped with the necessary skills to execute their tasks. They also make the point, that even if expatriates are equipped with the necessary competencies, knowledge transfer may still prove challenging given the attitude of local employees, (also referred to as Host Country Nationals of HCN's by Mahajan & De Silva (2012)) towards recognising value in the process; they define this concept as, "subsidiary absorptive capacity" (Chang, et al., 2012, p. 927).

In their work on inter-organisational knowledge transfer, Easterby-Smith, Lyles, & Tsang (2008) argued that successful knowledge transfer depends on characteristics of both the source and the recipient of knowledge and provide a model of factors influencing knowledge transfer that includes inter-organisational dynamics, which mediate the process, such as power relations and social ties. This model is depicted in the figure below.

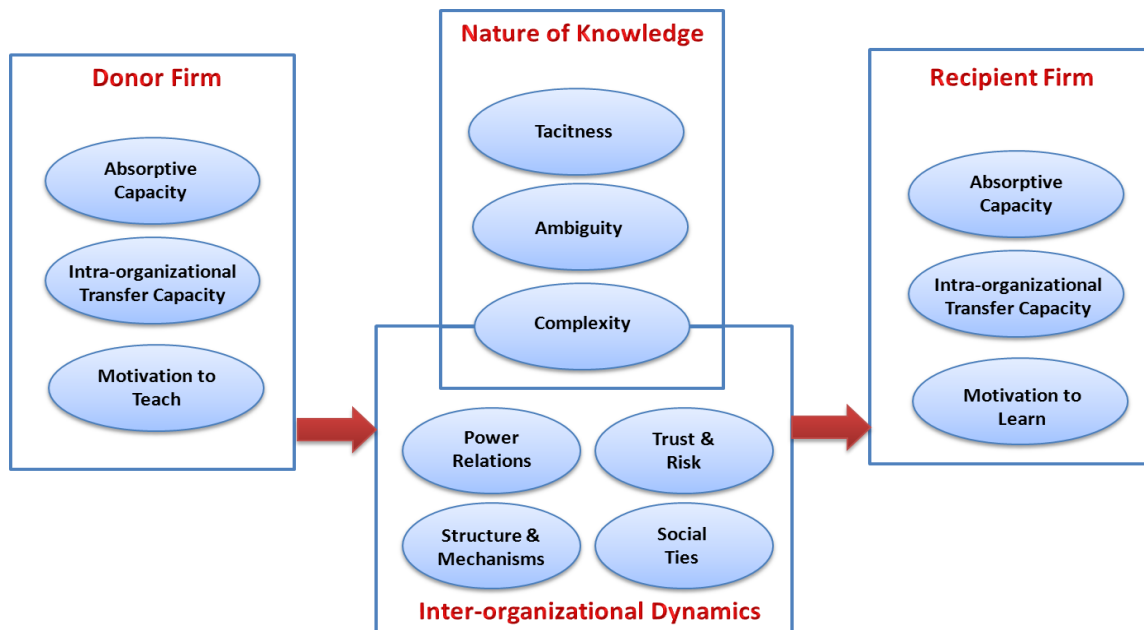


Figure 5: Factors influencing inter-organisational Knowledge Transfer (Easterby-Smith, et al., 2008)

Based on the research, it is note-worthy to observe that there are interdependencies between different leadership challenges experienced by expatriates. Clearly, these challenges do not operate independently from each other; instead, they function together to create multi-dimensional personal and professional leadership challenges for expatriates.

2.3.4. The uniqueness of doing business in Africa and the associated leadership challenges for expatriates

With 54 countries, comprising almost a billion people, and approximately 3000 tribes, speaking 2000 languages, Africa is a uniquely diverse continent (Zijlma, 2013); a map and some facts (including some fun facts) pertaining to Africa may be located in Appendix D.

Keller (2007, p. 46) argues that despite Africa having experienced a relatively brief period of colonialism, it “profoundly reordered African political space, modes of economic production and social hierarchies” resulting in, “domination, exploitation and organised repression”. He states that while the independence era enabled African-led regimes to change

this legacy, many countries established “carbon copies” of previous colonial systems. This is supported by Super & Harkness (2008, p. 108) who talk about the “lingering effects of colonialism” in Africa.

The legacy of colonialism has led to challenges of economic stagnation and massive debt (Keller, 2007). The extent of African poverty is also picked up by Akokopari (2006, p. 129) who comments on the “paradox” of Africa being, “rich in natural resources but most poverty stricken”. Poverty as described by Fox (2010) has accompanying social costs; one of them being crime. Drawing on their research conducted in African countries, Baguma & Furnham (2012) and Awung (2011) also suggest a strong association between poverty and crime. An interesting yet disturbing criminal trend within Africa is the frequency of kidnapping; Osumah & Aghedo (2011) describe kidnapping as a lucrative business in Nigeria, that has made multi-millionaires out of Nigerian youth, while Graham (2011) contends that kidnapping in North and West Africa is nothing new.

However, crime does not occur in isolation of an enabling environment; Broadman (2008, p. 103) contends that the main challenge for Africa and its leaders is characterised by, “poor governance and regulatory burdens” that continue to severely limit trade and investment. Sadly, this problem can become an infinite loop, as O’Regan (2010, p. 4) describes the increase of crime as further weakening Africa’s, “already fragile governance institutions”. Poor governance negatively impacts African economies by facilitating market destabilisation and volatility Arezki & Nabli (2012) and Huang (2012)). According to Olatunbosun & Oluduro (2012) corruption within African countries has become so pervasive that it is difficult to do business without the involvement of bribery.

The latest statistics from the World Bank Enterprise Surveys on Africa, reveal that on average, approximately 30% of firms in Sub Saharan Africa identify crime, theft and disorder as a major constraint to doing business, with more than 60% of firms in the Democratic Republic of Congo reflecting so. (The World Bank, 2012). An extract of the information may be found in Table 3 below.

Table 3: Crime Indicators for Africa (The World Bank, 2012)

Extract of crime indicators from The World Bank Enterprise Surveys (2011)	Sub-Saharan Africa	Congo, Dem. Rep. (2010)	South Africa
% of firms paying for security	61.9	38	76.4
Average security cost (% of annual sales)	3.9	11	2.1
Average losses as a result of theft, robbery, vandalism or arson (% of annual sales)	6.6	10.2	2.4
% of firms identifying crime, theft and disorder as a major constraint.	28.1	63.3	38

Corruption was another challenge faced by expatriates working in Africa; Van den Bersselaar & Decker (2011) argue that corruption in Africa has become an institution. In a recent study within developing countries, Faruq, Webb, & Yi (2013) suggest that corruption reduces organisational effectiveness and may be traced back to the lack of governance. According to Kakonge (2012) and Mbaku (2010), levels of corruption within Africa are high. Games (2010) argues that increased business risk results from macro-economic volatility linked to corruption, which has implications for doing business in Africa. This supports the sentiments of Hamman, Woolman, & Sprague (2008), who emphasise that African economies create complex and unpredictable business environments, and caution that doing business in Africa could be difficult and dangerous.

The latest statistics from the World Bank Enterprise Surveys on Africa, reveal that approximately 40% of firms in Sub Saharan Africa identify corruption as a major constraint to doing business. (The World Bank, 2012); corrupt business practices were manifested in a variety of different ways including the obligatory giving of gifts to public and tax officials to move processes along and to secure government contracts, operating and import licenses, and electricity and water connections. Indicators are also provided for the value of gifts that firms are expected to provide to secure government contracts (with the value of the expected gift being a percentage of the total contract value).

A detailed table of corruption statistics for Africa may be found in Appendix H; of interest to note from the data, was that over 70% of firms in the Democratic Republic of Congo and over 80% of firms in Niger indicated that corruption was a major constraint to doing business. By comparison, 16.9% of South African firms indicated the same findings. It is arguable that for expatriates working in Africa, corruption creates leadership challenges for executing business operations, especially as expatriates may be subject to different governance and control mechanisms.

The corruption indicators are reflected below for Angola, (against the average for Sub-Saharan Africa and South Africa) in Table 4 below

Table 4: Corruption Indicators for Africa (The World Bank, 2012)

Corruption Indicators from The World Bank Enterprise Surveys (2011)	Sub-Saharan Africa	Angola (2010)	South Africa (2007)
% of firms expected to give gifts to public officials "to get things done"	34.9	48.9	15.1
% o of firms expected to give gifts in meetings with tax officials	18.2	34.2	3.1
% of firms expected to give gifts to secure government contract	33.8	58.5	32.2
Value of gift expected to secure a government contract (% of contract value)	3.2	9.8	1.7
% of firms expected to give gifts to get an operating license	19.8	39	0
% of firms expected to give gifts to get an import license	16.1	55.6	2.7
% of firms expected to give gifts to get a construction permit	26.3	48.1	0
% of firms expected to give gifts to get an electrical connection	21.3	53.8	6.7
% of firms expected to give gifts to get a water connection	21.4	50	4
% of public transactions where a gift or informal payment was requested	18.4	42.9	3
% of firms experiencing at least one bribe payment request	23.2	51.3	4.2
% of firms identifying corruption as a major constraint	37.2	75.6	16.9
% of firms identifying the courts system as a major constraint	14.5	23.6	1.6

Keller (2007, p. 48) synthesises four main politico-economic challenges of globalisation for Africa; namely, “human security and development, the debt crisis and trade issues, domestic and regional conflicts and democracy and human rights”. However he acknowledges that over the past five decades, Africa has undergone much transformation and seen improvements made to African political and economic systems. He, suggests, business challenges notwithstanding, African countries are increasingly valued for natural resources and lucrative goods markets, making them an attractive business option for countries around the world.

According to Games (2010), another leadership challenge facing expatriates working in Africa was the difficult local logistics that they had to contend with, again, on a personal and a professional level. Games (2010, p. 9) discusses the difficult local logistics of doing business in Africa, which include, “great distances, the lack of suitable premises, high rents, weak domestic economies, which do not allow for easy local sourcing of requirements, expensive hotels, bad roads, poor infrastructure, unreliable power supplies, a lack of telecommunications, high local taxes, a lack of skilled labour and inefficient banking systems.”

In discussing the impact of globalisation on Africa and the implications for business and leadership, (Kasongo, 2010) and Darley & Blankson (2008, p. 380) argue that, “as companies move to do business in Africa, a greater sensitivity to African culture will be required and an understanding of African cultural realities should facilitate business transactions”. In earlier research Gbadamosi (2003) commented on the importance of foreign managers understanding the values of a typical African employee.

Despite the myriad of tribes and diversity of culture in Africa, Darley & Blankson (2008, p. 380) acknowledge that, “to propose a monolithic African culture, may be inaccurate due to strong national differences”, however distinct commonalities amongst cultures exist. These include the importance of conformance to customs and traditions of the community, the importance of, “doing good and being of good character”, the importance of living in harmony with the universe, the influence of religion

and ancestry on behaviour and norms, respect for elders, the use of symbols and community and collectivism (Darley & Blankson, 2008, p. 378). These principles are embodied in the practices of Ubuntu and Indaba, (discussed earlier in this chapter).

According to Newenham-Kahindi (2009, p. 236), “Ubuntu and Indaba both assume that once stakeholders are well treated and their core needs are met, there will be a reciprocal response. They will feel they are part of a firm’s family, will be dedicated in their work, will have a high level of accountability and trust, will become more innovative, productive for the firm and for their own interests”. Arguably, this poses a leadership challenge to expatriates who may be unfamiliar with the culture, norms and practices associated with these leadership norms and practices. The actions of managing people, delegating tasks and making executive decisions would take on a new complexion when juxtaposed against the norms and practices of Ubuntu and Indaba, especially if expatriates have been schooled in diverse leadership paradigms (discussed above and outlined in Table 1).

An interesting point was made by Littrell, et al. (2013) who reflected on research revealing that, despite being part of Africa, and aware of the principles of Ubuntu and Indaba, the leadership behaviour preferences of Black and White South Africans bears a strong resemblance to what he refers to, as a Western approach towards business leadership practice. This was consistent with the research of Nyabadza and Nkomo (2011), cited in Littrell, et al., amongst South African CEO’s, where they discovered less demonstration of the principles of Ubuntu and more exhibitions of charismatic leader behaviour (Littrell, et al., 2013).

As with expatriates working elsewhere in the world, skills transfer was also documented as a leadership challenge for expatriates working in Africa. Kamoche, Chizema, Mellahi, & Newenham-Kahindi (2012, p. 2829) argue that, “one of the key channels of acquiring and applying knowledge is learning from talented expatriates” and go on to advocate for increased

research into the ostensibly limited area of those elements that help or hinder the process of knowledge transfer from expatriates working in Africa to local African employees. They also put forward a view that for effective knowledge transfer to take place, there needs to be ability and willingness on the part of local employees to obtain and assimilate knowledge and in addition to a willingness on the part of expatriates to share such knowledge (Kamoche, et al., 2012).

In keeping with the Ubuntu principles of communalism and reciprocation, Kamoche, et al. (2012) encourage expatriates working in Africa to understand the benefits their organisations can realise by being open to learning from the local African environment and people, thus enhancing the depth and breadth of their organisation's understanding of the African environment, instead of perceiving the process to be a unidirectional approach. In reflecting on their research of the knowledge transfer challenges experienced by expatriate nurses in South Sudan, Tjoflåt & Karlsen (2012) describe the one-way communication style demonstrated by expatriates towards local African employees. They argue that this was due to the inherent assumptions held by expatriate nurses that they had superior skills and competencies and knew more about nursing care than the local African employees, whom they were there to train and transfer knowledge to.

A possible explanation for this type of behavior was offered by Fechter & Walsh (2010, p. 1197), who compared the superior behavior of expatriates towards local employees to, what he defines as, "postcolonial continuities". He argues that it is critical for expatriates to be cognisant of their inherent personal biases that may permeate their behavior in an inappropriate manner, thus negatively impacting their ability to fulfill their mandates. As a result of these personal biases and stereotypes, Tjoflåt & Karlsen (2012) make the case for effective cross-cultural training and specify that this should not be generic, but rather context specific, such that expatriates working in different African countries may meaningfully develop cultural sensitivity to the areas they work in.

Effective cross-cultural training programs for expatriates is at the heart of the arguments put forward by Kuo (2012), Okpara and Kabongo (2011) (2011), Shaffer, et al. (2012), Darley & Blankson (2008) (2008), Avril & Magnini (2007) and Pires, et al. (2006) inter alia, for expatriate success. However the research conducted by Okpara and Kabongo (2011), focuses specifically on the impact of cross-cultural training for adjustment of expatriates working in Nigeria. In support of the research by Avril & Magnini (2007), Okpara & Kabongo also discovered that the most effective forms of cross-cultural training were experiential in nature (Okpara & Kabongo, 2011). However they also acknowledge that despite available research on the positive link between cross-cultural training programs and expatriate adjustment, many companies neglect to provide their expatriate employees with such programs; they conclude that there remains a significant gap between academic theories of cross cultural adjustment and the practice thereof. One of the reasons they offer in trying to make sense of the stance adopted by these MNC's, is that company decision-makers may be disconnected or divorced from realities on the ground, by virtue of a lack of international expatriate experience and thus perceive in-depth, multi-dimensional experiential cross-cultural training as an unnecessary company expense.

In attempting to address the leadership challenges of doing business in Africa, Darley & Blankson (2008, p. 374) state that to succeed in the African marketplace, MNC's, "must understand the beliefs, attitudes, and perceptions that characterise African culture" and suggest that for leaders to receive buy-in and desired organisational behaviour and performance from local Africans, company policies would need to be consistent with an African value systems. They go on to provide examples of critical cultural dimensions that should not be ignored by expatriates; these include religion, reciprocity and time.

Regarding reciprocity, Darley and Blankson, like Littrell, et al. (2013), Khoza (2011) and Newenham-Kahindi (2009) argue that this is a principle of Ubuntu and prevalent in organisational behaviour within Africa,

characterised by conformance with good character, respecting elders, recognising the role of symbolism and the authority inherent in one's position within a hierarchy (Darley & Blankson, 2008).

Thus a heightened cultural sensitivity that may have developed through effective cross-cultural training, and an acknowledgement of inherent personal stereotypes and biases (that left unchecked, could negatively expatriate adjustment in Africa), may work well towards gaining trust, building relationships and expediting overall expatriate adjustment in Africa. Ultimately Darley & Blankson (2008) sum up the implication for leaders in international business, by arguing that an appreciation and understanding of African culture is no longer an option for companies wishing to do business in Africa, but a necessity.

2.3.5. Leadership challenges of South African expatriates working in Africa

As Darley & Blankson (2008) have argued, that despite great cultural diversity, cultural commonalities across Africa prevail, Games (2010, p. 4) also argues for common challenges and business risks experienced in Africa, notwithstanding that Africa cannot be considered a, 'homogeneous entity'. Some of these challenges include inter alia, political and fiscal risk, poor leadership and corporate governance, currency fluctuations, corruption within governments, lack of investment in people development and high business costs associated with the lack of basic services, facilities and infrastructure. These risks pose challenges to South African expatriates while on assignment in Africa.

Bester's case study research into the expatriate adjustment challenges of a South African woman based in Africa, (as the spouse of an expatriate), revealed that cultural adaptation was a serious challenge that influenced the overall success or failure of expatriates (Bester, 2008). An interesting alternative view of cross-cultural training for expatriate success was put forward by Vogel & Van Vuuren (2008). In their research on the factors influencing preparation, support and training of South African expatriates,

Vogel & Van Vuuren conclude, that while cross-cultural training for South African expatriates was important, it was not necessary to diversify cross-cultural training based on different variables. They argue that, “irrespective of the assignment related variables - location and duration of the assignment - or the expatriate related variables - age and management level of the expatriate, all expatriates require the same preparation, support and training” (Vogel & Van Vuuren, 2008, p. 88). This perspective is completely divergent to the views and findings shared earlier in this chapter; they do however acknowledge that a small sample size was a limitation to their research.

It bears noting that while there is vast research focusing on the leadership challenges of expatriates (in general), current research on leadership challenges of South African expatriates (working in Africa) is limited. This was substantiated by Vogel & Van Vuuren (2008) who contend that little research exists about the South African expatriate experience.

2.3.6. *Research Question:*

What are the leadership challenges facing South African expatriates working in Africa?

2.4. Conclusion of Literature Review

The literature review begins by contextualising the increasing influence of globalisation on international business and the implications for global talent management. Definitions were provided for the concepts of leadership and expatriates, with a focus on the importance of context in understanding what leadership is. Thereafter an overview of some of the different leadership paradigms was provided followed by a selective discussion on some of the leadership trends applicable to expatriate work. These included Situational Leadership, Adaptive Leadership, Ubuntu and Indaba. Next, the challenges experienced by expatriates were discussed, revealing one of the main challenge to be the inability of expatriates and

their spouses to adjust to host countries, necessitating the provision of effective and context specific experiential cross-cultural training for expatriates and their families. This was followed by a discussion on the uniqueness of doing business in Africa and the leadership challenges for expatriates working in Africa. Finally the leadership challenges of South African expatriates working in Africa were discussed, notwithstanding the limited research and literature available on the topic.

2.4.1 Research Question:

What are the leadership challenges facing South African expatriates working in Africa?

CHAPTER 3: RESEARCH METHODOLOGY

This chapter describes the methodology followed to address the research question of this study and begins with a brief discussion around the theory of research methodology or paradigm employed namely qualitative research. Other components of the research methodology process are next discussed focusing on the research design process, the population and sample and the research instrument that was used, (in this twenty to thirty (20-30) minute semi-structured interviews). Thereafter the procedure for data collection and the process of data analysis and interpretation, (content/ thematic analysis) will be discussed. The chapter will also briefly discuss the possible limitations of the research process and the implications thereof, before concluding with a discussion on validity and reliability of the study, and how to best approach these concepts within the qualitative research domain.

3.1 Research methodology /paradigm

This investigation has made use of a phenomenological qualitative research methodology in order to gain insight into the research question. According to Hancock & Group (2007, p. 2), qualitative research is about human behaviour and is, “concerned with developing explanations of social phenomena”. Put differently, qualitative research attempts to understand why things are the way they are and differs from quantitative research, which focuses on measurability (Hancock & Group, 2007).

Hancock & Group (2007) go on to describe typical characteristics associated with qualitative research; some of these characteristics include the fact that qualitative research focuses on opinions, experiences and feelings of people and produces subjective data collected through direct encounters with respondents. Also given the time taken to collect data in this process, sample sizes tend to be small, which may lead to criticism about the generalisability of study results to larger populations. In response to the criticism about the lack of generalisability, they argue that

one of the basic elements of qualitative research is that it allows research to focus on certain specific groups of people, without intention of generalisability to bigger populations (Hancock & Group, 2007).

Phenomenological research, “begins with the acknowledgement that there is a gap in our understanding and that clarification or illumination will be of benefit” (Hancock & Group, 2007, p. 4). They go on to argue that the value in phenomenological research lies in generating awareness and understanding and not in providing absolute and definitive explanations.

The aim of this research is not generalisability to a larger population, but a focus on exploration around the specific population sub-set. For the purposes of this research investigating the leadership challenges of South African expatriates working in Africa, this is the most appropriate form of research methodology to increase insights into this issue.

3.2 Research Design

Semi-structured in-depth interviews of twenty to thirty (20-30) minutes each were used to gather information from respondents. Even though a disadvantage of this approach is the expense and time invested to gather the data, Given argues that a clear advantage exists for the potential of richness of data around the phenomena under investigation (Given, 2008).

Hancock & Group (2007) describes semi-structured interviews as a series of open-ended questions related to the items the researcher intends to cover as part of the study. An advantage of using this approach is the open-ended nature of the process as it provides opportunities for either the researcher or the respondent to probe certain topics for enhanced clarification. However, in order to take full advantage of this approach, it is best for researchers to have an idea (in advance) of the different aspects they wish to cover. Another advantage is that the atmosphere is generally informal enabling respondents to be more relaxed and open as they share their personal experiences. However as mentioned earlier, the process tends to be time-consuming; thus sufficient time was allocated in the

research project plan for data collection; this notion is supported by Hancock & Group (2007, p. 10) who state that while this process may appear easy, it requires great forethought and, “extensive preparation”.

Of importance to mention in the research design phase is what Carlile & Christensen (2004) refer to as the descriptive stage of theory building, a three stage process that they argue researchers must pass through (in an inductive and deductive manner) in order to begin to develop normative theory. Through careful observation, documentation and measurement of phenomena (including data anomalies), researchers build the foundation of theory development, referred to as constructs, which help to make sense of the detail of phenomena and how they operate. Thereafter, researchers classify constructs into categories, also referred to as frameworks or typologies. According to Carlile & Christensen (2004), these attempts to categorise the constructs is intended to simplify and organise the world such that possible relationships between phenomena and the outcomes of interest are highlighted. In the third and last stage of theory development, researchers then explore the relationship between their categories and the outcomes observed. These outputs may be referred to as models such as the **Who-What-How-WOW!** Model developed out of this research (see Chapter 6). This process is outlined in the figure below.

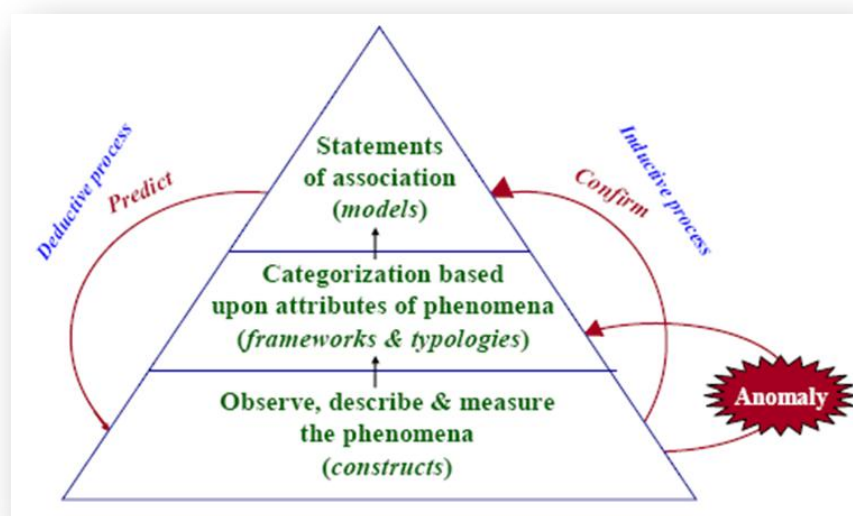


Figure 6: The process of building theory (Carlile & Christensen, 2004)

In transitioning from descriptive to normative theory, Carlile & Christensen (2004, p. 5) argue that through careful and detailed, “empirical and ethnographic observation”, researchers may move beyond statements of correlation (descriptive theory) to, “define what *causes* the outcome of interest” (normative theory). With an understanding of causality, researchers may work to improve theory by following the same three steps used in the descriptive stage. According to Carlile & Christensen (2004, p. 6), “By cycling up and down the pyramid of normative theory, researchers will ultimately define the set of the situations or circumstances in which managers might find themselves when pursuing the outcomes of interest” thus allowing researchers to make statements of causality in different situations. This process is depicted in the figure below.

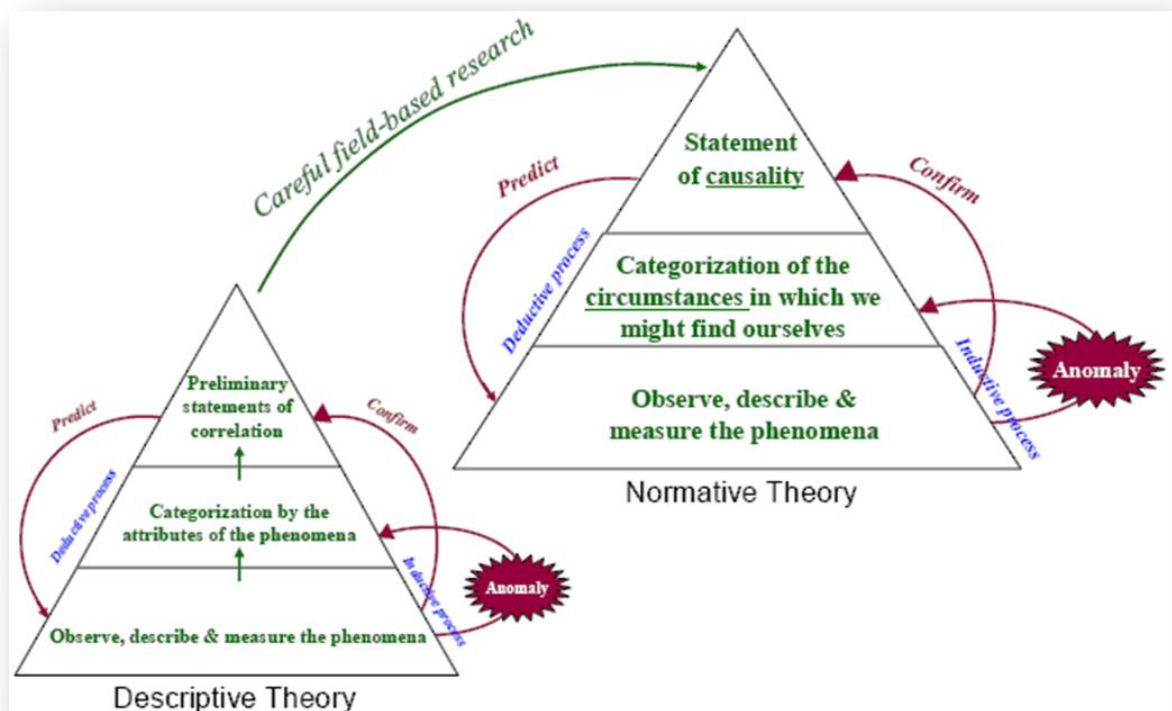


Figure 7: The transition from descriptive theory to normative theory (Carlile & Christensen, 2004)

This qualitative research on the leadership challenges of South African expatriates working in Africa is intended to build descriptive theory, from which other researchers may investigate causality in the development of normative theory.

3.3 Population and sample

3.3.1 Population

The population consists of South African expatriates who have worked (or who are currently working) in a leadership role, in Africa.

3.3.2 Sample and sampling method

The first process of filtration or sampling segmentation was to consider those South African multi-national companies (MNC's) and organisations with business interests on the African continent and who have expatriate employees in these subsidiaries, with a minimum of three months expatriate experience working in Africa. Altogether fourteen semi-structured interviews were conducted. The demographic profile of the fourteen respondents interviewed may be located in Table 6 (in Chapter 4). A signed and scanned electronic covering letter was emailed to the respondents, followed by a telephone call to confirm receipt of letter and a brief telephonic introductory discussion.

3.4 The research instrument

The semi-structured interview questionnaire used during the interviews is located in Appendix B. Hancock & Group (2007, p. 10), advise semi-structured interviews be used as a preferred method of collecting data on explorative topics as they allow both the researcher and respondent flexibility to elaborate on various items; they argue that this allows the researcher to be, "receptive to unexpected information from the interviewee". Also where time limitations could constrain the richness of the data collected, this method enables the researcher to steer the conversation to specific areas. Another advantage of using semi-structured interviews is the generally informal manner in which they are conducted thus helping the respondents to relax, which could benefit the richness of information shared (Hancock & Group, 2007).

3.5 Procedure for data collection

Semi-structured interviews necessitates direct contact with respondents (Hancock & Group, 2007). Hence, face-to-face interviews were pre-arranged to take place at a venue convenient for the respondents; it was assumed that this would be at the offices of the respondents. However, in those instances where respondents were on expatriate assignment in Africa, interviews were facilitated via telephone.

A signed and scanned electronic covering letter was emailed to the respondents, followed by a telephone call to confirm receipt of letter and a brief telephonic introductory discussion. The purpose of the covering letter was to introduce the researcher, and briefly explain the purpose of the research and the request for participation. The covering letter also confirmed confidentiality of the information shared and that the interviews would be tape-recorded for the purposes of optimising time and data efficiencies. A copy of this covering letter is located in Appendix A.

Prior to the interview, a reminder email and text message was sent to respondents. An indication of the research question and an overview of some of the broad elements to be covered in the interview was included in the email. This was done to ensure the respondent had the opportunity to think over the research question and be better prepared for the session, with a view to optimising time and data efficiencies during the actual interview. During the session, every attempt was made to keep the atmosphere casual and non-threatening, while maintaining a professional code of conduct.

3.6 Data analysis and interpretation

Boieje (2010) describes qualitative data analysis as dismantling, segmenting and re-constructing data to facilitate meaningful interpretation. Content and thematic analysis was used to analyse and interpret data for this study. Given (2008) describes qualitative content analysis, facilitated through identifying themes in the data as, thematic analysis. According to

Hancock & Group (2007, p. 17), content analysis is a, “procedure for the categorisation of verbal and behavioural data, for purposes of classification, summarisation and tabulation”. To refine the process of content analysis, thematic analysis was used; this process is presented in Figure 8 below. (Braun & Clarke, 2006).

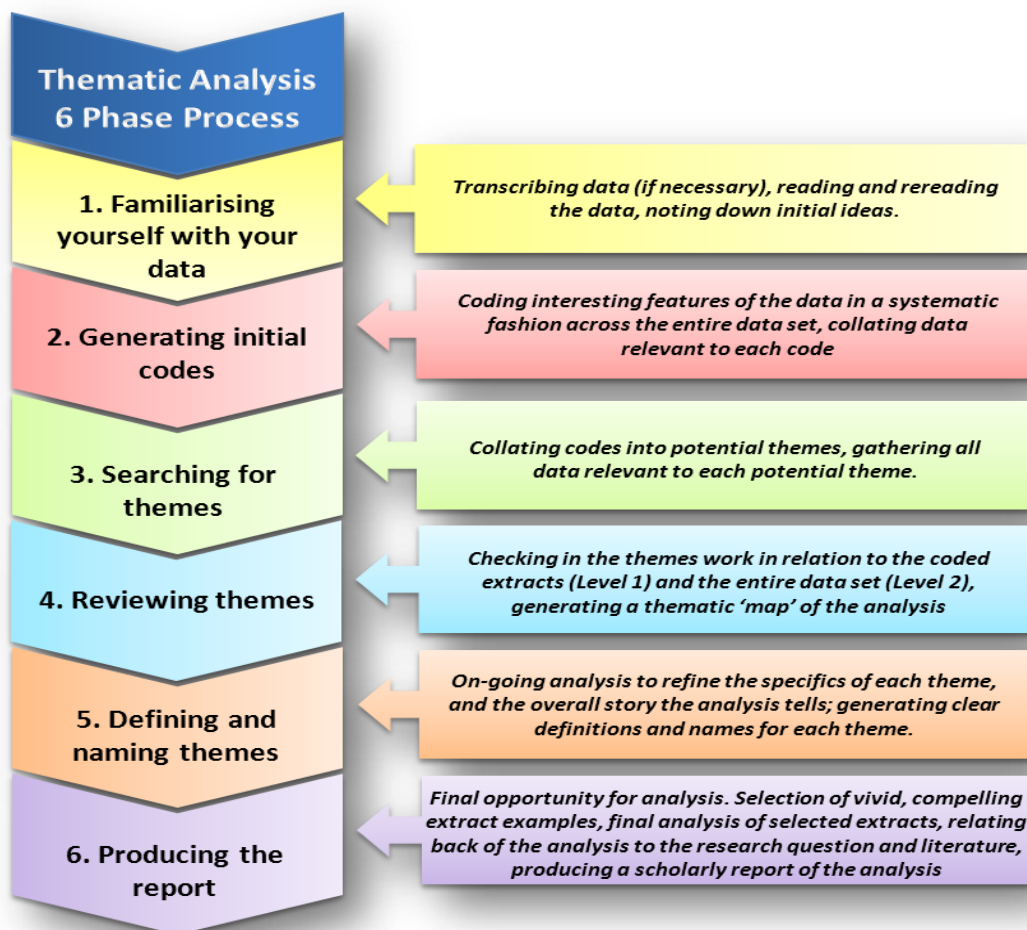


Figure 8: Six Phases of Thematic Analysis (Braun & Clarke, 2006)

Braun & Clarke (2006, p. 4) define thematic analysis as, “identifying, analysing and reporting patterns (themes) within data”. Braun & Clarke (2006) also outline potential risks in doing thematic analysis such as using the questions on the research instruments as the themes; this was factored into the data analysis process of this research investigation.

3.7 Limitations of the study

Possible limitations to this study were identified at the outset of this study. As the study progressed, some of these limitations did materialise. These limitations and potential implications thereof are tabulated below:

Table 5: Limitations and implications of the research

Limitations related to the research methodology	Implications of the limitations for the research investigation
Availability of sample respondents	Data collection took longer than anticipated thus impacting research plan
Last minute unplanned interview postponements from respondents	Data collection took longer than anticipated thus impacting research plan
Lack of quantitative methodology (mixed methodology of research)	Did not allow for a measurable component related to the research question
Lack of video conferencing facilities should respondent currently be on assignment in Africa	Telephonic interviews were conducted in these cases; this affected cost and quality of the data collection process as face-to-face interaction and behavioural nuances were missed. In addition, poor telecommunication network facilities resulted in broken connections, thus impacting cost and time dimensions
Qualitative research methodology criticised for lack of generalisability	The research will not allow for generalisations to be made for all South African expatriated working in Africa; it is intended to be an explorative study, increasing insight into the experiences of the population sampled.

3.8 Validity and reliability

Krefting (1991, p. 214) argues that while the worth of a quantitative research project lies in assessing its reliability and validity, this focus on the merit value of research, “is much less common in qualitative research”. Wahyuni (2012, p. 77) suggests that qualitative research has weathered criticism for its lack of generalisability. She describes reliability as concerning the consistency of measures, (thereby allowing for research

repeatability or replication) and validity as the extent to which the research “reflects social phenomena being observed” and argues traditional understandings are a misfit for qualitative research.

In the earlier seminal work of Guba (1981) on the criteria for assessing the trustworthiness of naturalistic inquiries, he advocated general criteria for research evaluation namely, truth value, applicability, consistency and neutrality and goes on to define each dimension from a quantitative and qualitative perspective. Guba (1981) argues that based on the philosophical and conceptual differences of qualitative and quantitative research, these criteria must be defined accordingly. Krefting (1991) tabulates these differences; this may be found in Table 6 below.

Table 6: Comparison of criteria by research approach (Krefting, 1991)

Criterion	Qualitative Approach	Quantitative Approach
Truth value	Credibility	Internal validity
Applicability	Transferability	External validity
Consistency	Dependability	Reliability
Neutrality	Confirmability	Objectivity

Krefting (1991) argues that little focus has been given to establishing the rigour of qualitative research, despite the increasing interest in it and goes on to provide a model to assess the trustworthiness of qualitative research, based on the earlier work of Guba (1981) and a summary of strategies to establish trustworthiness for different phases of the qualitative research process such as study design and data collection. She argues that these strategies are important to researchers, “in designing ways of increasing the rigor of their qualitative studies” (Krefting, 1991, p. 215). This summary is located in Table 7 below.

Table 7: Strategies to establish trustworthiness within qualitative research (Krefting, 1991)

Strategy	Criteria
Credibility	Prolonged and varied field experience
	Time (sampling)
	Reflexivity (field journal)
	Triangulation
	Member checking
	Peer examination
	Interview technique
	Establishing authority of the researcher
	Structural coherence
	Referential adequacy
Transferability	Nominated sample
	Comparison of sample to demographic data
	Time sample
	Dense description
Dependability	Dependability audit
	Dense description of research methods
	Stepwise replication
	Triangulation
	Peer examination
	Code-recode procedure
Confirmability	Confirmability audit
	Triangulation
	Reflexivity

According to Krefting (1991, p. 214), “subjective meanings and perceptions of the subject are critical in qualitative research” and she argues that it is the responsibility of the researcher to access these. She further argues that, too frequently, “qualitative research is evaluated

against criteria appropriate to quantitative research and is found to be lacking” (Krefting, 1991, p. 214) and that due to the differences in nature and purpose of quantitative and qualitative research, qualitative researchers agree that it is wrong to apply the same criteria of worth.

Like Guba (1981), Guba & Lincoln (1989), Krefting (1991) and Bryman (2012) supports that qualitative research cannot be assessed by using the same criteria of reliability and validity as is used by quantitative research. Krefting (1991) and Bryman (2012) advocate alternative terms as cited in Guba (1981) and Guba & Lincoln (1989), that could be used to assess reliability and validity of qualitative research; these will be discussed under the relevant subheadings below, in relation to the research undertaken, with a brief comment on its applicability to the research.

3.8.1 External validity (transferability)

Krefting (1991, p. 216) states that applicability is the degree to which research findings may be applicable in other contexts, defining it as the, “ability to generalise from the findings to larger populations” and argues that two approaches to applicability are appropriate for qualitative research. Firstly, due to the purpose of qualitative research being to describe a particular phenomenon or experience and not to generalise to other phenomena or experiences, applicability (or generalisability) is not viewed as relevant to quantitative research. Secondly, the issue of the transferability of qualitative research (also referred to as external validity in quantitative research) is pertinent to its applicability. Krefting (1991, p. 216) argues that when research findings fit into contexts outside the study situation “that are determined by the degree of similarity or goodness of fit between the two contexts”, qualitative research has met the criteria for transferability and applicability. It bears noting that according to Guba & Lincoln (1985) transferability is more important for the researcher wanting to transfer the findings to another situation or population rather than that of the researcher of the original study. They further argue that if the original

researcher has put forward appropriate descriptive data to allow for comparison, this would be sufficient to address the issue of applicability.

According to Wahyuni (2012, p. 77), transferability refers to the, “level of applicability into other settings” and argues it is possible to apply a qualitative study in different settings if the research findings are drawn from sufficiently rich data. Thus, this research, while it is not intended to be generalisable, may be transferrable, thus fulfilling the requirement of external validity (transferability).

3.8.2 Internal validity (credibility)

Guba & Lincoln (1985) use the term credibility to define internal validity of qualitative research and argue that this assumes that a single tangible reality to be measured. Wahyuni (2012, p. 77) describes credibility as the, “accuracy of data to reflect the observed social phenomena”; put differently, does the study measure what it intends to measure?

According to Krefting (1991, p. 215) in quantitative research, internal validity is supported when, “changes in the dependent variable are accounted for by changes in the independent variable, that is, when the design minimises the effects of competing confounding variables by control or randomisation”. She argues that in qualitative research, truth value is obtained from, “the discovery of human experiences as they are lived and perceived by informants” thus making credibility of qualitative research distinctly subject-oriented, not dependent on being defined at the outset by the researcher (Krefting, 1991, p. 215). She further argues that truth value is the most important criterion for assessing qualitative research. This research is intended to be an explorative investigation of a specific population sub-set of South African expatriates working in Africa, thereby increasing insights around that sample and their tangible realities. The research thus fulfils the requirement of internal validity (credibility).

3.8.3 Reliability (dependability)

Krefting (1991) argues that at the heart of research reliability, lies that value of repeatability, where replication of the research procedures will not alter research findings, thereby fulfilling the research criterion of consistency. She refers to quantitative research as having strict methods of research design and observation to ensure and control for research repeatability, and thus reliability, which differs from the field of qualitative research where, “extraneous and unexpected variables” may present themselves (Krefting, 1991, p. 216). However she also argues, based on the work of Guba & Lincoln (1985) that consistency in quantitative research is based on the assumption of a single reality that can be used as a bench-mark and if one assumes there are multiple realities (as is the case of qualitative research), the notion of reliability is less relevant.

According to Krefting, qualitative research, “emphasises the uniqueness of the human situation, so that variation in experience rather than identical repetition is sought” and she argues that “The key to qualitative work is to learn from the informants rather than control for them” (Krefting, 1991, p. 216). Of note to mention is that qualitative research expects to find variability and focuses on the range of experiences (instead of the average experience), thus allowing room for “atypical or non-normative” occurrences which Krefting (1991) notes is important to include in the findings, and has been in the case of this research. Carlile & Christensen (2004) further support the importance of the discovery of anomalies in the building of better research theory.

Wahyuni (2012, p. 77) describes dependability as pertaining to research replicability and repeatability, taking into account, “changes that occur in a setting and how these affect the way the research is being conducted”. She argues that dependability can be achieved by a thorough explanation of the research design and process, such that other researchers may adopt a similar model. This research has endeavoured to make these explanations thoroughly and thus fulfils the criterion for dependability (reliability).

CHAPTER 4: PRESENTATION OF RESULTS

4.1 Introduction

In this chapter, the results of the study are presented and briefly described. The chapter begins with a presentation and description of the demographic profile of the full sample of respondents, interviewed in one-on-one semi-structured interviews during the research process. It is important to have an understanding of different demographic dimensions as this contributes to the diversity or similarity of views espoused by respondents. Thereafter the chapter presents and briefly describes a high-level summary of the overall study results. This summary takes the format of ten (10) core themes, distilled and refined from responses to the research question, focusing on the leadership challenges facing South African expatriates working in Africa.

4.2 Demographic profile of respondents

In total, fourteen (14) semi-structured one-on-one interviews were conducted with respondents across different industries to assess their perception on the leadership challenges facing South African expatriates working in Africa. Before the start of each interview, respondents were asked a series of questions to provide greater insight into their demographic profile.

Insight into the demographic profile of respondents is a useful lens through which to view the overall study results, as this type of information may influence the personal opinions and perceptions of respondents, thereby affecting the study results.

Table 8 presents an overview of the demographic information of all the respondents who participated in the study against different categories of interest and their subsequent classification.

Table 8: Demographic profile of respondents

Category	Classification	Number of Respondents	Total
Gender	Male	12	14
	Female	2	
Age	30 - 34	2	14
	35 - 39	2	
	40 - 44	3	
	45 - 49	3	
	50 - 54	3	
	55 - 59	1	
Number of years spent on expatriate assignment in Africa	3-11 months	1	14
	1-4	4	
	5-9	5	
	10-14	0	
	15-19	1	
	20-24	1	
	25-29	2	
Race (as per South African classification)	Black	4	14
	Asian	3	
	Coloured	0	
	White	7	
Type of Industry	Consulting & Project Management	2	14
	Mining	5	
	Fast Moving Consumable Goods (FMCG)	1	
	Government & Public Utilities	3	
	Telecommunications	2	
	Aviation	1	
Number of African countries lived in while on expatriate assignment	1-3	8	14
	4-6	4	
	7-9	1	
	10-12	1	
Designation of leader while on last (or current) expatriate assignment	Top Management	7	14
	Senior Management	4	
	Middle Management	3	

At the beginning of the research process, it was planned to have a fairly even spread of male and female respondents in the research sample, however the process of finding available female respondents proved to be challenging. This resulted in lengthy delays to the data gathering process.

Furthermore it was also envisioned that the sample of respondents from a racial spread perspective would be more in line with South African Economically Active Population (EAP) statistics. However, these two elements of the research planning process did not materialise; respondents were predominantly classified as White and male. Further discussion around the presentation of this data and the observations made will be dealt with in the Chapter 5 of this research report.

4.3 Results pertaining to the Research Question

To lend more structure to the process of addressing the research question and focusing on the leadership challenges facing South African expatriates working in Africa, the respondents were guided by three (3) overarching questions, (and appropriate probing questions) in the semi-structured interviews conducted. The actual research instrument is located in Appendix B.

After capturing and coding the responses, an on-going iterative process of distilling and refining core themes from the data was conducted, in accordance with the process of thematic analysis discussed in Chapter 3. Eventually ten (10) core themes from sixty-five (65) data codes were identified to best represent the respondent's' information on the leadership challenges of South African expatriates working in Africa. The themes focused on the leadership challenges from a personal and professional perspective.

Key tenets that emerged from the data analysis process were around acknowledging and adapting to different business norms and practices, personal transformation and family adjustment, people management and relationship building and having to manage business operations and

deliver on business mandates, while contending with a perceived lack of support and awareness from the South African based head-office for the realities faced on the ground while expatriate assignment. These core themes are presented in Table 9 below.

Table 9: Ten (10) Core Themes from the data

Ten (10) Core Themes distilled around Leadership Challenges of South African Expatriates working on the African continent	
Core Theme 1	Adjusting to the uniqueness of African cultures, norms and practices
Core Theme 2	Managing the change impact of expatriate assignment on family
Core Theme 3	Adapting to local living conditions while on assignment
Core Theme 4	Understanding the prevalence of crime and corruption and the impact on business leadership
Core Theme 5	Delivering on business mandates while managing the mismatch of SA norms within an African context
Core Theme 6	Acknowledging and appreciating personal mental models, attitudes and stereotypes
Core Theme 7	Understanding and managing local market and working conditions
Core Theme 8	Conducting effective networking and relationship building
Core Theme 9	Leading and managing local and expatriate employees
Core Theme 10	Enabling business operations amidst lack of support from home country head office

4.4 Summary of the results

This chapter focused on a presentation of the demographic profile of the research respondents and an overview of the results in the form of core themes that emerged as part of the data analysis process.

In total, fourteen (14) respondents participated in this research study and shared their views to the research question in semi-structured interviews guided by three over-arching questions, (see actual research instrument in Appendix B) and the appropriate probing questions. Of interest to note was that the majority of the sample consisted of older White males, (ranging from 40-55 years). Furthermore respondents' demographic information reflected a wealth of experience from working in Africa, across a number of different countries.

The results were presented in the form of a table outlining ten (10) core themes. These were distilled and refined from a set of sixty-five (65) codes from the data. Responses to the research question were from a personal and professional perspective. Key broad areas of leadership challenges focused on acknowledging and adapting to different business norms and practices, personal transformation and family adjustment, people management and relationship building and having to manage business operations and deliver on business mandates, while contending with a perceived lack of support and awareness from the South African based head-office for the realities faced on the ground while on expatriate assignment.

The results presented described in this chapter will be discussed in greater detail in Chapter 5.

CHAPTER 5: DISCUSSION OF THE RESULTS

5.1 Introduction

The purpose of this chapter is to discuss and explain the results of the data analysis of the semi-structured interviews conducted with respondents, assessing the leadership challenges facing South African expatriates working in Africa.

This chapter begins with a discussion and brief explanation on some of the key findings regarding the demographic profile of respondents that was presented in the form of a table in Chapter 4. The demographic information collected provides a valuable lens through which to examine and analyse the data as it may help to explain the opinions and perceptions that research respondents have expressed and what may have been influencing factors in their views.

Thereafter, an in-depth discussion structured around the ten (10) core themes presented in Chapter 4, pertaining to the analysis of the results will be undertaken. Respondents expressed their view on the leadership challenges facing South African expatriates from a personal and professional perspective. In discussing the results, reference will be made to the literature review in Chapter 2 and respondents' opinions.

Where applicable, quotations from respondents will be used to illustrate and explain the discussions and arguments put forward. To add additional insight and maintain the integrity of the process, these extracts will be quoted verbatim, notwithstanding the possible grammatical errors the direct quotations may contain. Given the length limitations of this research report, effort has been made to select those specific quotations best representative of the core themes under discussion. The chapter concludes by summarising the main essence of the ten core themes.

5.2 Demographic profile of respondents

5.2.1. Race

The vast majority of respondents were White (seven (7) in total). There were four (4) Black and three (3) Asian respondents; however there were no Coloured respondents as part of the sample. The sample was thus not reflective of South African Economically Active Population (EAP) statistics and targets. It was envisioned that the sample should be more representative of current South African EAP demographics, in which case the racial demographic information should have reflected a majority of Black respondents, however this did not materialise.

A possible explanation for this may be the historical disparities in employment patterns that were practiced under South Africa's political legacy of Apartheid⁶. In the past Black employees were not eligible for senior positions within companies; therefore the system did not give Black employees the opportunity of being involved in the relatively exclusive niche employment category of expatriate work, as those opportunities may have been reserved for White employees.

5.2.2. Gender

Another interesting element of the demographic findings was that the vast majority of respondents were male (twelve (12) in total out of a sample size of fourteen (14)). There were thus only two female respondents in the entire sample. This was not for lack of trying to find female respondents. The process of trying to find female respondents who met the criteria outlined in Chapter 3, proved challenging and resulted in lengthy delays to the data gathering process.

⁶ Apartheid was the legalised system of White supremacy and forced racial segregation in South African from 1948 – 1994 (Google Definition, 2013)

The lack of available female respondents may again be reflective of historical disparities related to the gender division of labour and the lack of equitable representation of women in the working environment. Historically (and arguably currently), employment statistics have been and still are not reflective of EAP targets.

Furthermore it may be argued that the nature of expatriate work, considering the extreme working conditions and impact on raising a family and nurturing a stable home environment, may not lend itself as an appealing field of employment to women. This raises an important flag for companies to consider when supporting female expatriates in their roles.

5.2.3. Age

The majority of respondents were forty (40) years and older, (ten (10) in total with the oldest respondent being fifty-five (55) years); very few of the respondents fell into younger age categories. There were just two (2) respondents who were under 35 years and two (2) respondent fell between the ages of thirty-five and thirty-nine (35 and 39) years.

A possible explanation for this is the family demands placed on younger people may prevent them from accepting or seeking employment known for having a negative impact on ones' domestic environment. This view substantiated by Respondent A who recommended that older candidates be selected for expatriate work assignments, due to their greater dependability as opposed to younger expatriate candidates who (from his experience) don't cope as well due to family issues and demands.

5.2.4. Number of years spent on expatriate assignment

Regarding the number of years that respondents had spent on expatriate assignment, this varied; four (4) respondents had a wealth of experience, ranging between fifteen (15) and twenty-five (25) years each and the remaining ten (10) respondents had between just four (4) months and ten (10) years of experience on expatriate assignment in Africa, with five (5)

respondents reflecting five to nine (5-9) years of experience. One of the candidates was relatively new to expatriate experiences and had been on assignment for just four (4) months; the experiences of this new expatriate were interesting to examine against the view of more experienced expatriates. A more refined breakdown of the different classifications for this category of data may be found in Table 4 located in Chapter 4.

The collective wisdom amassed over the number of years spent on expatriate assignment lent well to the richness of the data provided in the study. There was also a link between the number of years spent on assignment in Africa and the number of countries lived in. Respondents who had greater experience, (in terms of years spent as an expatriate) also tended to have more exposure to different African countries.

5.2.5. Type of industry

The type of industries that respondents came from varied and was split amongst the private and public sector. It was deliberately specified that self-employed individuals be excluded from the sample of respondents.

The broad industry categories comprised of Consulting and Project Management, Mining, Fast Moving Consumable Goods (FMCG), Government and Public Utilities, Telecommunications and the Aviation industry. Most of the respondents came from the Mining sector (not surprising as Africa is well-known for its abundant mineral resources).

5.2.6. Number of countries lived in while on expatriate assignment

Respondents were asked how many countries they had lived in while on expatriate assignment; the majority of respondents (12 in total) had lived and worked in up to six (6) African countries. Of this amount, eight (8) respondents had lived in one to three (1-3) countries and four (4) respondents had lived in four to six (4-6) countries. There were also two

(2) respondents who had lived and worked in up to twelve (12) African countries while on expatriate assignment in Africa.

As mentioned above, there was a link between the number of years that respondents had as expatriates and the number of countries lived in. The more years of experience had by a respondent, the more likely they were to have lived and worked in multiple countries. This lent positively to the richness of the data obtained in the study.

It was envisioned that respondents should have spent time in at least one or ideally two or three different countries, however what materialised from the data gathering process in terms of African counties lived in while on expatriate assignment, far surpassed original expectations.

5.2.7. Designation on last (or current) expatriate assignment

Finally, respondents were asked what their designation was while on their last (or current) expatriate assignment. The majority of respondents (seven (7) in total) fell into the category of Top Management, while there was a reasonably even spilt amongst the rest of the respondents between Senior and Middle Management.

Designations were deliberately specified for the last or current expatriate assignment of respondents due to the already established wealth of experience over many years and different countries (and arguably possibly different designations in the process). The designations of respondents were in line with the leadership capacity that this study focuses on. Therefore candidates were ideally suited to respond to the leadership challenges experienced by South African expatriates.

5.3 Discussion pertaining to Research Question: Analysis of the Ten Core Themes

5.3.1 Core Theme 1: Adjusting to the uniqueness of African cultures, norms and practices

*“Smooth seas do not make skillful sailors”
African proverb⁷*

One of the biggest themes that emerged from the data analysis was the leadership challenge of adjusting to diverse and unique cultures, norms and practices, whilst on expatriate assignment in Africa; all respondents made reference to this. According to Pires, et al. (2006), culture barriers pose a significant challenge to expatriates’ ability to adjust.

According to Respondent A,

“The customs of the people there and the conventions...
What is customary and what is conventional. You don’t know
that. Even stuff that people take for granted you don’t know.
You don’t know who to talk to, you don’t know where to get
information and what that does from a leadership point of view
is it constrains you and restricts you”

Most respondents commented and elaborated on their leadership adjustment challenges to African culture, norms and practices, from a personal perspective; however there were also respondents who mentioned leadership challenges associated with adjusting to norms and practices within the working environment (professional perspective). A variety of similar sub-themes were clustered together to make up this core theme; these include inter alia, cultural acclimatisation, ethnocentricity demonstrated by local people in the different African countries, work ethos and work ethic, gender discrimination and the associated gender division

⁷ African proverb sourced from an internet based search (World of Quotes, 2013)

of labour, and diverse religious and cultural practices, such as dry fasting and polygamy.

One of the sub-themes was the local work ethos and work ethic that many respondents felt challenged by in their leadership capacities. This was evidenced by their perception of the wide-spread lack of urgency (and the proverbial “*African time*”⁸) demonstrated by locals⁹ for the timelines and tasks that they were expected to deliver on as part of their mandate. Many respondents admitted that it was struggle to get used to this.

According to Respondent D

“The main difference when you go out in Africa is the work ethic, time keeping is not great and responses are not great”

Respondent H succinctly captures this wide-spread perception of a lazy local work ethic,

“A big challenge is the local work ethic. Locals have issues in terms of work time, especially in Portuguese and French speaking Africa. A lot of them like their lengthy breaks and vacations, irrespective of work deadlines. So even though you have a deadline, it is not their deadline.”

An interesting example of the leadership challenges facing expatriates within the working environment was with regard to ageism¹⁰. Respondent M spoke about the age discrimination he experienced as a result of being a younger leader. Referring to his experiences in Nigeria, he indicated that ageism was experienced amongst leaders below 40 years and that these expatriates struggled to gain the respect of their peers. He summarised this by stating that,

“The use of age as a leadership qualifier was difficult to deal with”

⁸ African time (or Africa time) is the perceived cultural tendency, in most parts of Africa, toward a more relaxed attitude to time (Google Definition, 2013)

⁹ Local people or Host Country Nationals (HCN's) in the different African countries

¹⁰ Ageism is stereotyping and discriminating against individuals or groups because of their age

While this was not a recurring sub-theme, it is pertinent to mention and substantiated by Darley & Blankson (2008) who argue that respect for elders is a fundamental tenet of the African value system. One of the reasons as to why this may not have come up in other interviews related to the demographic profile of the respondents interviewed, the majority of whom were over 40; Respondent M who was in a Top Management position at just 36 years, was unlikely to be respected as an elder.

The diverse religious and cultural practices of locals formed another sub-theme that posed challenges to leaders. According to Levtzion (2012), the diversity across Africa has produced rich traditions, in which a variety of different religious beliefs and practices have emerged over time. She goes on to argue that the integration of Muslim and African communities and practices has seen Islam having significant impact and influence within African communities. With over 40% of Africa's population following Islam, (compared to 2% in South Africa) it is understandable cultural practices will exist that may be unfamiliar to South Africans (Melton & Baumann, 2010). Respondents commented on their lack of familiarity with some of these practices and the challenges this presented. Speaking of his experiences in Algeria (a predominantly Muslim country in Northern Africa), Respondent K mentioned his challenging experiences during the month of Ramadan¹¹. According to him, while in the presence of locals, the dry fasting associated with this religious practice had to be observed by all expatriates in the country as a form of respect, irrespective of their own religious practices. Considering that most of his work outputs were conducted in the sun (on the airport run-way), he commented on the struggle he experienced with dehydration as a result thereof.

Another element raised by respondents was the topic of local food and eating habits and the associated local dietary conditions and customs. Local African people were reported to eat differently and exhibit behaviour

¹¹ Ramadan is the ninth month of the Muslim year, during which strict fasting is observed from sunrise to sunset (no food or liquids may be consumed from sun-rise to sun-set). (Google Definition, 2013)

associated with food, unfamiliar to South Africans. Respondent L described his difficulty in getting used to some of the practices associated with sharing a meal together where it was common for different people to use their hands while eating off the same plate.

Respondent E reiterated this and the culture shock he experienced, making reference to the culturally acceptable practice of burping¹²,

“So there is a little bit of a culture shock so you see things that’s normal in a certain cultures, but unacceptable in your culture so its adaptability. Eating with hands, things like that...big mess and burping...you gotta accept it because it’s not frowned upon in certain cultures, so you must accept it”

Respondent L also spoke about the prevalence of couscous¹³ in the local diet and the absence of his familiar and much loved South African pap. Both Respond L and Respondent E spoke about local food and water quality negatively impacting the health of South African expatriates. Respondent C, E, G, H, and J spoke about the lack of familiar brands and how basic things like not having recognisable home brands can have an impact on the expatriate’s ability to adjust. In their research into the choices, challenges and consequence of global work assignments, Shaffer, et al. (2012) emphasise that stress, adjustment and identity transformation brought about by the loss of familiarity were the main challenges experience by expatriates on assignments.

A unique case of this was Respondent J who discussed specific examples to illustrate the impact of managing local employees and accommodating their needs emanating from diverse cultures, norms and practices. Two examples were the acceptable cultural practices of polygamy¹⁴ and female circumcision¹⁵; arguably, practices frowned upon amongst South Africans,

¹² The process of noisily releasing air from the stomach through the mouth

¹³ A type of North African semolina made from crushed durum wheat (Google Definition, 2013)

¹⁴ The practice or custom of having more than spouse at the same time (Google Definition, 2013)

¹⁵ The traditional practice of cutting off the clitoris and labia of girls or young women (Google Definition, 2013)

(Respondent J referred to the process of female circumcision as sexual mutilation). She also commented that at various stages during the month, she would have to accommodate and have to deal with medical issues and sick-leave requests from women who had been circumcised.

According to Respondent J,

“For instance in Egypt when you dealt with women, you not only have to deal with them as woman, you had to also deal with them based on their religion and be aware that most women were sexually mutilated....Egypt was the case and also Mali, where every single Mali women is circumcised....it’s horrific... Which leads to problems in the mission because it’s a sensitive subject; but it’s a reality, for instance when women were menstruating, they were in pain for ten days because they could not bleed properly, because they would be cut and sewn up....and every time they had a baby they’d be sewn up very tight...it was horrific; but that was like a daily thing that you had to take note of while working with them.”

With regards to the practice of polygamy, Respondent J mentioned this was an openly acceptable practice and needed to be accommodated in the execution of her role as an expatriate. Multiple spouses were referred to as co-spouses, and would need to be included at different work-related events. Support for the culturally acceptable practice of polygamy is offered in Grinker, Lubkemann, & Steiner (2010, p. 391), who reflect that 63% of all marriages in Nigeria, and 51% of marriages in Sierra Leone, are “polygamic marriages”.

According to Respondent J,

“Polygamy is an acceptable practice”

The specific cultural practices of female circumcision and polygamy were not commonly mentioned by respondents across the data; again this may be due to the demographic profile of the respondents interviewed, where

Respondent J was one of the two females interviewed and had amassed a wealth of expatriate experience (over 20 years), while Respondent N was the other female respondent and the newest expatriate, with less than a year of experience, (4 months at the time of being interviewed).

The occurrence of gender discrimination is also worth mentioning, as African culture tends to be dominated by a patriarchal ideology where the culture, norms and practices promote a male-dominated society. Bawa (2012) discussed this in her article on women's rights and culture in Africa and the extent to which patriarchal traditions inform and influence this. Bawa goes on to argue that globalisation and economic disparities serve to bolster gender discriminatory cultural customs (Bawa, 2012).

According to Respondent J,

“There is a clear division of gender there. Mali, Egypt, Morocco and Swaziland are still quite bad”.

Being a woman Respondent J experienced several challenges with regard to gender discrimination. Two such challenges were the lack of female toilet facilities in prisons, where she had to execute work tasks and the incidents of sexual harassment she had personally experienced. Another challenge was respecting the conservative dress code, despite the extreme heat and humidity associated with the African climate. When asked to elaborate on the biggest leadership challenge she experienced, Respondent J was open about her experiences of not being taken seriously as a woman wanting to do business, despite having the available capital to validate her intent. As evidence of this she mentioned difficulty in establishing and opening bank accounts.

Another interesting component of the culture, norms and practices that permeated the experience of many respondents was local motorists' behaviour. Respondent E and L reported the selfish and aggressive behaviour of local drivers, especially those in the public transportation industry. Respondent E indicated that in Tanzania, drivers have to get off the roads for buses to avoid accidents. Games (2010) and The World

Bank Enterprise surveys (The World Bank, 2012) emphasised the challenges of poor road and rail infrastructure when doing business in Africa. Coupled with poor road infrastructure and the type of drivers who were said to make South African taxi drivers look good, this posed challenges to many respondents in terms of mobility and smooth business supply chain management.

5.3.2. Core Theme 2: Managing the change impact of expatriate assignment on family

*“I long, as does every human being, to be at home wherever I
find myself”*

Maya Angelou¹⁶

The sub-themes contained in this core theme relate largely to the negative impact on family; more generally to the spousal and family adjustment experience as a result of joining the expatriate family member and living in a new country. Education and schooling issues of children who joined parents on expatriate assignment was also part of the sub-themes falling under this core theme. According to Respondent G, the impact of spousal adjustment was, in his opinion, one of the biggest challenges facing expatriates. He stressed that expatriates should focus on taking care that the needs of their spouses are attended to in the process.

Respondent J shared these sentiments when talking about the challenges she and her family faced; her husband found it difficult to adjust to the language barriers, which frustrated his efforts to do ordinarily simple things like purchasing groceries for the family. In her opinion Respondent J emphasised that the spouse of the expatriate always has a bigger adjustment challenge than the expatriate per se. She said,

¹⁶ English proverb sourced from an internet based search (The Phrasefinder, 2013)

“Spouse adjustment is a problem because if you are the working person, you’ve got a purpose to get up in the day and you would be doing what you would do in any other country. If you are spouse, you are the one who makes the biggest adjustment...you have to find out where are shops are, how to get around, what do people do, and financially you are not earning the money so that can be a frustration, especially today where most couples have 2 salaries”

The impact on family as a result of expatriation is supported by research and literature. According to Shaffer, et al. (2012, p. 1290), “Personal and familial relationships, as well as work–family balance concerns, are also important considerations for corporate expatriates” and argue that the ability to manage family problems that may arise during the assignment, remains a challenge for expatriates. In support of this, Mäkelä, Käsälä, & Suutari (2011) make the case for work-family conflict as a result of the expatriate assignment, which is in support of the research done by Starr & Currie (2009) and the research done almost ten years ago by Mayerhofer, Hartmann, Michelitsch-Riedl, & Kollinger (2004) on the relationship strain that may arise due to separation as result of one spouse being on assignment.

Not all the respondents took their families with them on assignment. For those who opted not to do so, the impact of not having their spouses and/or children around proved quite challenging in terms of adjusting into the new role and to the new country. Respondents A, H and N all made reference to the impact on family as a result of not being together.

According to Respondent H,

“Missing out on your life back home...nothing prepares you it. Everything back home moves on and you have to re-adapt. You miss out on the development of your loved ones”

At the time of the interview, Respondent M was based in Ghana and going through similar experiences; she emphasised the importance of taking

family on expatriate assignment. She had taken her daughter, but not her husband and son; the impact on the family as a result of this decision was a challenge for her to manage. Hill (2011) and Okpara & Kabongo (2011), argue that the main reason for expatriate failure was the challenges of family adjustment, specifically spousal adjustment, which follows on from earlier research that family strain and stress placed as a result of the expatriate assignment, may negatively affect performance and output of the expatriate (Mayerhofer, Hartmann, & Herbert, 2004).

Respondent K also touched upon these challenges and the ensuing high divorce rate common amongst expatriate engineers within his industry as a direct result of the nature of expatriate work. Respondent L highlighted newly married expatriates who, in his opinion, had a far greater challenge with regards to managing impact of expatriate assignments on family, than with established families. This was also mentioned by Respondent A, who believed that younger unmarried and older expatriates were less likely to have family adjustment challenges, than those married expatriates with young developing families.

According to Respondent A,

“The first group is where you are young and single and you go overseas as an expat and it’s good fun...The second group is where you have all the problems...Newly married with kids...big, big problems there. Does the wife and the kids also go? If they do go, it becomes even more expensive because you got to find a school to cater for the kids. You also got huge medical insurance associated with it. If you leave the wife and kids behind...you then run the risk of alienation, the family unit breaking down, productivity going down quite significantly because the guy misses his family. The third bunch of expats is quite older, elderly and can travel....they don’t have the kids so they can go for two or three years...”

The issue of adequate education facilities for children was another sub-theme contributing to the challenge of managing the change impact of expatriate assignments on the family. Both Respondents A and D mentioned the challenges of balancing work and family life while trying to find schools, a sentiment also shared by Respondent J, who had experienced difficulty in Mali with the lack of available and appropriate secondary educational facilities; her daughter was grouped other teenagers from different grades and felt held back with her educational development, which led to feelings of depression. However Respondent J did acknowledge that this was a challenge specific to Mali; while on her other expatriate postings, her children attended good international British schools.

5.3.3. Core Theme 3: Adapting to local living conditions while on assignment

“Instead of seeing the rug being pulled out from underneath you, you can learn to dance on a shifting carpet”

Thomas Crum¹⁷

A strong thread running through the majority of the responses was the leadership challenges of being able to adapt to local living conditions on expatriate assignment. The sub-themes contained in this core theme had impact on the personal and professional lives of expatriates and included inter alia, local road infrastructure, the lack of adequate medical and health-care facilities and extreme weather conditions.

According to Thomas & Schroll-Machl (2010, p. 345), “Each international assignment leads to more or less pronounced psychological and physical strain caused by the new work environment and social setting,” and go on to argue that apart from the more obvious episodes of culture-shock experienced by expatriates, there were also a number of other stress

¹⁷ Leadership quote sourced from internet based search (BrainyQuote, 2013)

factors associated with the environment that should not be underestimated; these include social, socio-cultural and professional stress factors. Support for their argument is offered by Shaffer, et al. (2012) in their research into the choices, challenges and career consequences of global work experiences, that emphasises the demands of the environment and local living conditions, and the impact that this may have on expatriates' ability to adapt and adjust accordingly.

As mentioned in Core Theme 1, poor road infrastructure was a challenge for expatriates. Respondents A, E, F, H and I agreed that the lack of adequate road infrastructure was a serious challenge that hindered both business operations and personal adjustment; for instance, Respondent L spoke about bad road infrastructure being the cause of delayed deliveries of work material and resources, which impacted project schedules and costs. These sentiments are consistent with that of Game (2010). Respondent I spoke about the futility of road maintenance due to the poor infrastructure, lack of proper drainage and heavy rainfalls;

“They will repair a road and within the next rain it will wash off again. You find constant problems with the roads, big potholes.”

Road infrastructure coupled with the prevalence of crime was reported to make overland travel a risk and a challenge, resulting in delayed supply chains and service delivery. Games (2010) argues that local logistics are difficult to navigate in Africa; road infrastructure is mentioned as one of the local logistics that present challenges for expatriates.

Extreme African weather conditions were a further subtheme that emerged from the interview data; Respondents C, J, and N lamented the extreme heat and humidity that contributed to the challenges of dehydration and fatigue, which negatively impacted their output; they reported that this was difficult to manage and adapt to. In certain cases, such as with Respondent K, (who worked in Algeria, a predominantly Muslim country), the extreme weather conditions were linked to religious and cultural practices such as the dry fasting associated with Ramadan (mentioned in

the discussion of Core Theme 1). During this period, expatriates could only consume food and liquids in private away from any locals, as it would be perceived as disrespectful to consume in the presence of locals who were observing the fast (and could result in serious repercussions). However when working on aeroplanes on the run-way in the heat, with reportedly scorching temperatures of up to 60 degrees Celsius, Respondent K commented on the struggle he experienced with dehydration as a result of not being permitted to consume water. This is reflected in the quote below from Respondent K.

“You know especially going to the Muslim countries like Algeria, it’s very difficult. We have to respect their religion and culture. Like during Ramadan, we have to watch what we eat and drink in that period, so it’s very tough. And working in conditions where its 60 degrees, how can you now not drink when you are not a Muslim? We have to drink water or we’ll dehydrate.”

Apart from the heat and humidity, Respondents K and L also spoke about extreme weather changes that were difficult to get accustomed to. These included extremely cold weather, desert storms and aggressive rain storms.

The challenge of the lack of adequate medical and health-care facilities was another sub-theme associated with the core theme of living conditions. According to Respondent H, one of the challenges facing South African expatriates was diseases, that were rare in South Africa were prevalent in African countries, especially those countries close to the equator. Respondents E and L discussed the high prevalence of malaria in the areas they were assigned to; commenting on his experiences in Botswana, Tanzania and Zambia, Respondent E reflected on mine inductions that advised people with malaria symptoms to seek medical attention immediately from the onsite clinic.

In general, the majority of respondents agreed that medical facilities were not of the same standard that they were accustomed to in South Africa

and in certain cases this had led to serious medical emergencies. Respondent J reported that her son had become extremely ill; however due to the poor medical facilities in Mali, they were not helped and instead were referred to a traditional healer. Poor medical facilities in Mali were also mentioned by Respondent L, who was unable to get medical assistance for a colleague, resulting in the individual having to be medically evacuated to South Africa.

According to Respondent J,

“And my son got very sick...he had malaria and pneumonia so another challenge is having access to adequate healthcare, which in Mali was atrocious. It was non-existent in fact. “

Linked to the issue of medical challenges was the challenge of snakes, that were a common feature of the landscape that some of the respondents lived and worked in. In the view of Respondent L, local African people were not as afraid of snakes as South Africans tend to be. Respondent E also emphasised the prevalence of snakes, in particular black mambas¹⁸ on the site he was based on, which was equipped with anti-venom and sliding screen doors to manage the risk.

Sharing his experiences on Geita Mine in Tanzania, Respondent E said,

“At Geita, there were black mambas all over the place so it’s a bit of a challenge,...but the accommodation is such that they have slide screens and the doors touch the ground with the rubber underneath to try and keep things out..... A guy was bitten by a black mamba when I was there and by the time they got him to the clinic 6.5kms away....the maximum you can put into a human body is 8 ampules of anti-venom, when he got there they had to put 6 in him and he survived, he was lucky.”

¹⁸ A highly venomous, slender, olive-brown to dark gray snake feared because of its quickness and readiness to bite (Google Definition, 2013)

Subsequent to his interview, Respondent E submitted photographs of an incident where a black mamba had to be managed on site. Pictures of this incident are located in Appendix E, depicting a large black mamba slithering up the wall of one of the camp site living quarters and the dead snake after it had been shot and strung up to demonstrate its vast length. It must be noted that if the reader has an aversion to snakes, these photographs may be of a sensitive nature.

Close confines and strict camp curfews, (of 6am – 6pm) were a further challenge relating to living conditions and contributed to the cabin-fever¹⁹ mentioned by Respondents A, E, and K. For those expatriates not living within camps, the issue of accommodation was not noted as a challenge; however for those living with strict curfews, living in close confines, coupled with a general lack of entertainment and the separation from spouses and partners was also a challenge that occasionally manifested in stress, aggression and frustration amongst expatriates. This posed a challenge to expatriates who had to carefully manage themselves against exhibiting aggressive behaviour or confrontation within the camps, as they could be dismissed from site for being involved in such activities.

Respondent E captures this when he says,

“Another challenge is that in the camps you got about 200 expats of all nationalities, you work with them, eat with them, socialise with them...your cycle is 3 months on 3 weeks off, so you can imagine the strain it puts on gents away from their partners...tempers flare....after two and a half months guys are at the end of their tether with each other....it's very stressful”

The lack of entertainment was not just mentioned by expatriates living in camps. The majority of respondents mentioned a lack of entertainment in their host countries and communities as a challenge. However Respondent K who had spoken about the challenges he had experienced

¹⁹ Irritability, listlessness, and similar symptoms resulting from long confinement

in Algeria, also acknowledged that he thoroughly enjoyed being in Ghana, so much so that he would consider relocating there. Respondents C and N also praised Ghana and said, for South African expatriates, Ghana was the easiest assignment, as it closely matched South Africa in terms of quality of lifestyle. However for expatriates in other countries, a lack of entertainment for adults and children proved to be a challenge in terms of adjusting.

5.3.4. Core Theme 4: Understanding the prevalence of crime and corruption and the impact on business leadership

“The fool speaks, the wise man listens”

African proverb²⁰

Fernandez & Kuenzi (2009) argue that crime, crime control and criminal punishment are arguably the most significant challenges facing a country and go on to support Bergman (2006) in the view, that countries who have recently experienced democratic reforms, tend to experience more crime. They go on to stress that such instances are prevalent in developing nations such as countries in Africa where on average, rates of crime tend to be higher than elsewhere in the world. The issue of crime in Africa, (and specifically West Africa) is discussed by O'Regan (2010) and De Andrés (2009) who provide examples such as drug trafficking, human trafficking and terrorism financing. According to O'Regan (2010, p. 2), the trafficking of illegal items is common in West Africa; he goes on to state that, “Arms, counterfeit medicine, cigarettes, and crude oil all move illegally to and through West Africa”. According to the latest statistics from the World Bank Enterprise Surveys on Africa, approximately 30% of firms in Sub Saharan Africa have identified crime, theft and disorder as a major constraint to doing business (The World Bank, 2012)

²⁰ African proverb sourced from an internet based search (World of Quotes, 2013)

Echoing the literature, this was another core theme that emerged during the interviews. It must be emphasised that this core theme, while closely linked with Core Theme 5, has been deliberately distinguished for the purposes of this report. While Core theme 5 focuses on the challenge of business practices perceived by respondents to be corrupt from a South African perspective, (such as facilitation fees²¹), this core theme focuses on those blatantly criminal and illegal incidents experienced by respondents, that impacted on their business leadership and personal security. The nature of the crime and corruption that expatriates had experienced or were exposed to varied and included inter alia, rebel attacks, theft, bribery, scams, kidnapping, illegal labour unrest and the subsequent impact on business operations. Respondent B related numerous instances of credit card theft that he had heard of and had personally experienced. This was reported to be prolific in the hotels where some expatriates were accommodated.

Another hotel scam openly discussed by Respondent E, was how prostitutes, in cahoots with hotel security personnel, prey on expatriates, by soliciting bribes through accusations of violence and abuse. He describes “very high class” prostitutes who pay hotel lobby managers and security personnel to be allowed into hotel pubs where they can solicit business. The arrangement also provides them with access to hotel rooms, where they approach pre-identified hotel guests in the middle of the night; once opened, the prostitute reportedly begins screaming about being abused thus alerting the security guard to rescue her and arrest the accused expatriate. Knowing the sensitivity around expatriates being involved in confrontations or violence, both security guard and prostitute demand a bribe to ensure no arrest is made. Feeling vulnerable, expatriates tended to pay these bribes thus protecting their jobs and personal health and safety (by avoiding foreign prisons in countries with unique legal system).

²¹ Facilitation fees refers to payment expected to help business deals move along quicker (Google Definition, 2013)

According to Respondent E

“If you get a knock at your door, you phone reception and say to them you have someone at your door and you not expecting anyone. Normally it’s a prostitute they’ve sent up that’s in cahoots with the guard...as soon as she’s in the room she starts screaming and the guard runs and rescues her, then they say, *“If you want me to shut up you pay us 2000 US\$ and we’ll shut up”*. So that’s how it works. A few guys I know got involved in this lot and they paid.”

The research of Olatunbosun & Oluduro (2012) on crime forecasting and planning in developing countries validates the experiences of respondents; they cite extortion, bribery, blackmail and other forms of economic fraud, (in addition to violent crime) as on the increase in these countries. According to Olatunbosun & Oluduro (2012, p. 41), “in many of these countries, corruption has become well rooted in their systems to the extent that you can hardly get anything done without having to bribe your way through”. Speaking of public transportation scams and the exorbitant costs charged to expatriates, Respondent L also mentioned the involvement of local police and the threat of going to prison if the fees were not paid.

This was supported by Respondent A who had commented on the state of African prisons and how detrimental this could be to one’s health and safety.

This point was raised in his discussion of expatriate mobility. In his opinion, expatriates should always have a driver and never drive at night, as apart from the potential road attacks at night, in the event of an accident and possible arrest, time spent in an African prison could fundamentally change a person. He talks about a blanket ban²² on night driving and says,

²² Complete prohibition or ban across the board (Google Definition, 2013)

“Blanket ban – nobody’s allowed to drive at night...Because if you have an accident, it can go really bad for you really quickly, especially as you are an expat...I’ve seen this in Nigeria, in Tanzania, where people have an accident, somebody gets killed, you could end up going to jail and spending 3 months there before you get out. Baring in mind, you’ve been charged with murder, but you haven’t been convicted, you just going to stay there until it gets to court and whoever pays the money. And after a 3 month stay in an African jail...you going to come out with a ‘far away’ look in your eyes.”

Another leadership challenge facing respondents was theft perpetrated by local organised crime syndicates that affected business operations such as diesel theft from trucks in transit and the many different individuals involved in and benefitting from the arrangement. In his opinion the high rate of theft was linked to the high levels of poverty experienced by locals, (diesel theft was just one of many things locals were involved in stealing).

According to Respondent E,

“also the diesel theft on the way...they would stop on the way at a little remote village and break the seal, the inspection covers and then syphon diesel out and fill it with water...so when it hits the weigh bridge on the mine it still weighs the same...So they were all involved....from the most junior to the most senior employee there...they were selling fuel and sharing the spoils... You gotta understand there’s a lot of poverty in these countries, so a guy gets hold of 310 litres of diesel and he sells it at 3 US dollars a litre, he’s making a lot of money. These guys are living on less than a US dollar a day so if they can steal they would”

In confirmation of these experiences, studies undertaken in Uganda by Baguma and Furnham (2012) and (Awung, 2011) draw the link between poverty and crime while Fox (2010) describes crime as one of the social costs associated with poverty.

Another leadership challenge experienced by respondents was the political instability and volatility in some of the African countries that they were assigned to; the exposure to rebel activity was a real threat facing respondents. This impacted respondents on a professional and personal level and was specifically mentioned by Respondents A, E and F.

According to Respondent F,

“So if you are working in those countries you find that politically they very volatile and usually that volatility will translate to instability on the ground that affects your ability to do business”

Political volatility and instability was often linked to issues of geography; those areas close enough to strife-torn areas could easily be affected by the unrest. According to (Awung, 2011, p. 4), “Civil strife, social unrest and political violence are common phenomena in Africa”. This view is in support of Ulriksen’s (2010) view that the West and Central Africa have suffered from wars related to territory control over the past twenty years. With reference to Geita Mine in Tanzania, which he explained was 100 kms from Rwanda and Burundi, Respondent E shared his experiences and was grateful for the security of the mine camp he was stationed at,

“The other challenge is that there is a lot of rebel activity...in my first week they tried to rob the explosives magazine, a whole lot of bandits with AK47s, fortunately we have a strong security department which is made up of mainly ex South African defence force and ex South African Police guys...they opened fire and that was quelled pretty quickly. Not a lot of rebel activity but it was there. In the 15months that I was there, there were 3.”

One of the more alarming elements of this core theme was the threat of kidnapping that expatriates were exposed to in Africa, which apart from money-making, also had a link to rebel activity and unrest. According to (Graham IV, 2011), kidnapping in North and West Africa is not a new phenomenon, and makes reference to the September 2010 kidnapping of seven people associated with the energy company Areva in the northern

Niger region. This is supported by Osumah & Aghedo (2011, p. 277) who argue that kidnapping has become a commodity in Nigeria, a business opportunity that has created multi-millionaires amongst Nigerian youth, (who demand, “huge ransom settlements”) and argue that, “kidnapping has become so pervasive in Nigeria that there is now a palpable apprehension among the people who are unsure of whom the next victim will be.” This was specifically made mention of by Respondent A, who related the incidents of kidnapping that he had been aware of.

According to Respondent A,

“Kidnapping is huge problem in some countries. If you get caught in the Delta and you are a South African working for an oil company, you are gone. You’ll come back in 6 months’ time, you would have lost a bit of weight, but the company will pay dollars to get you back. There’s currently a South African guy who got picked up by the rebels in Timbuktu, he’s yet to be returned....he’s somewhere in desert.”

While this theme focuses on crime and corruption as it pertains to the above examples, it has been deliberately separated from the perception of corrupt African business practices that several respondents mentioned in their interviews. This element is captured under the next Core Theme, and will be discussed under the mismatch of South African norms in the context of doing business in Africa.

5.3.5. Core Theme 5: Delivering on business mandates while managing the mismatch of South African norms within an African context

*“When the drummers change their beats the dancers
must also change their steps”
African proverb²³*

One of the more common challenges mentioned by a number of respondents was their perception of corrupt business practices that permeated the African expatriate landscape and the consequent impact on delivery of business mandates. All but one respondent spoke about this challenge; it is of interest to note that the only Respondent N did not speak of this as a challenge; it is arguable that in her relatively short experience (a mere four months), she had not yet been exposed to this.

Van den Bersselaar & Decker (2011) argue that corruption in Africa has become an institution. Andvig (2010, p. 10) defines corruption as the, “abuse of public power for private benefit” and goes on to provide examples of corruption that include fraud, embezzlement, extortion, theft, and bribery and comments that bribery is, “the most typical corrupt act.”

The latest statistics from The World Bank Enterprise Surveys on Africa, reveal that approximately 40% of firms in Sub Saharan Africa identify corruption as a major constraint to doing business. (The World Bank, 2012); corrupt business practices manifested in different ways including the obligatory giving of gifts to public and tax officials to move processes along and to secure such things as government contracts, operating and import licenses and electricity and water connections. A detailed table of corruption statistics for Africa may be found in Appendix H.

The prevalence of these corrupt business practices were said to affect the delivery of business mandates and operations, and was particularly

²³ African proverb sourced from an internet based search (World of Quotes, 2013)

challenging to manage when their South African companies had policies prohibiting their participation in such corrupt practices. These practices were not considered to be consistent with good corporate governance, as outlined in the King iii report, considered by PricewaterhouseCoopers (2010) to represent a milestone in the evolution of corporate governance in South Africa. Respondents A, D, F and G all emphasised that the manner of conducting business in Africa was completely different from how it is conducted in South Africa.

According to Respondent D,

“South African policies and practices not always applicable within African context of doing business”

According to Faruq, Webb, & Yi (2013) the lack of governance in developing countries encourages corruption and diminishes bureaucratic effectiveness, which consequently has a negative impact on economic performance. When faced with a lack of governance in their working environments, respondents felt constrained by the strict governance that their companies expected them to adhere to; these proved to be overly restrictive and in certain cases, served to inhibit successful operations and delivery. Games (2010) and Broadman (2008) argue that ineffective leadership and poor governance is an over-arching trend applicable across the continent of Africa. In support of this, Kakonge (2012) and Mbaku (2010) concur that corrupt business practices are pervasive in Africa.

Sharing his experiences in Angola, Respondent H commented,

“There were virtually no governance or compliance structures in place at all. Things are done but there are no controls, there’s nothing. South Africa is light-years ahead in terms of governance, so as a South African entity operating there, we had to abide by South African rules, but trying to get the locals to abide by those rules was a nightmare.”

The reason for separating this specific sub-theme from the previous core theme associated with crime and corruption was based on the understanding that these businesses approaches and practices were perceived to be corrupt from a South African perspective, but in fact were a completely acceptable method of conducting business in African countries. Respondent A openly acknowledges that from his experience, business practices viewed to be corrupt in nature, (as perceived by South African norms and standards), were just part of the normal manner of conducting business when working in Africa. This was also emphasised by Respondents C, E and K.

According to Respondent K,

“Corruption and bribery are a natural way of doing business; favours are rewarded...if you want to get plane spares out of Customs quicker, you must pay facilitation fees.”

The challenge thus experienced by respondents was managing the mismatch of their South African norms, characterised by strict governance and controls of business operations, within a uniquely African context, where the lack of controls enabled an environment perceived by South African expatriates to be corrupt. As referred to in the quotation from Respondent K above, an example was the acceptable process of paying facilitation fees to move processes along. Perceived by expatriates as a bribe, this placed them in awkward and uncomfortable positions.

According to Respondent C,

“Corruption is rife - if money passes hands, life is much easier”

It was reported that the failure to pay these facilitation fees could bring business operations to a standstill, however their company policies prohibited participation in such practices and still expected timeous delivery on business mandates. This was a significant leadership challenge for respondents to manage. Linked to this was the challenge of getting local employees to abide by South African governance procedures.

According to Respondent H,

“South African regulation and governance is difficult to implement on foreign soil, you are obliged to play by different rules. Getting locals to abide by South African rules is a nightmare. South African governance and protocol can impede business being conducted; it can bring business to a halt”

Respondent F, a senior executive in the Fast Moving Consumable Goods (FMCG) industry, had an interesting perspective on the issue of facilitation fees. While he acknowledged that there was an association between facilitation fees and bribery, he cautioned that expatriates should not adopt a blanket view to such things and rather understand that in some instances facilitation fees are intended to benefit local organisations.

According to Respondent F,

“Facilitation fees are nothing new; it has been a way of doing business for hundreds of years and that's just how they do business in Africa.... But it's not always corrupt, for example, many parastatals are cash strapped so often the funding that you give them is going to the organisation and not an individual”

Being foreigners in the different African countries, South African expatriates had to interact regularly with local Home Affairs, Port and Harbour Authorities and Customs. Several respondents discussed the challenges of engaging these local officials, as their reluctance to pay facilitation fees could and (in some instances) did affect the issuing of visa, passports, work permits or the clearance of goods from Customs. In some cases, respondents admitted to paying these fees just to move processes along. Respondent B had to buy his Visa while Respondent C had to buy his passport for one hundred US dollars. Respondent H spoke about how important consumables such as food and medicine supplies could be held back for months in the harbour due to the failure to pay facilitation fees, thus incurring huge business losses and affecting lives, while Respondent

E discussed how fuel lubricants, essential to keeping the mines “wet” for optimal functioning, could be delayed at the harbour for lengthy periods.

According to Respondent E

“The whole of Tanzania works on corruption - if you pay, your goods come out of the port quickly, if you don’t, your goods come out last.... that was a big challenge for me trying to keep our mine lubricated & fuelled....when a ship came in it could take 15 – 25 days to get clearance. If you go to Dar es Salaam you’ll see ships out at sea...there’s hundreds waiting to go in.”

In all cases where there was reluctance or failure to pay these facilitation fees, human lives and business operations were detrimentally affected. Linked to this situation was the challenge of having to deal with the subsequent frustration, demotivation and lowered morale experienced by expatriates as a result of being negatively affected by this practice.

The process of facilitating smooth and efficient business operations did not always take the form of money. Respondents C and K spoke about favours expected in order to move business along. Respondent C described how his fuel sales were impacted because his competitor took the leadership team hunting twice a year, which he confirmed was a completely acceptable business practice.

On a separate note, but still in keeping with this core theme about the mismatch of South African norms with an African business context, was how business decisions get made in Africa and the link to cultural norms. In Africa, decisions tend to get made via consensus, in accordance with the principles of Ubuntu and Indaba (Littrell, et al., 2013). This was a challenge for the respondents, who were more accustomed to being decisive leaders, who could easily take executive decisions. However for better buy-in and support from local employees and other critical stakeholders, respondents found that they had to adapt their leadership style.

According to Respondent F,

“So in some cultures in some countries, decisions are made on position, so if you are head of the department, the expectation is that you will make the decision. But in Africa, decisions are made by consensus. So you listen to everyone’s point of view, and eventually we all contribute towards a decision...if you want people to actually buy into your decision and actually do it and not have any kind of passive resistance then you gotta make sure you get everyone on-board and everyone agrees and buy into the decision, and its collective and there’s consensus.”

There is strong support from the literature for decision by consensus, as core to the process of decision making within African tradition. Newenham-Kahindi (2009, p. 92) discusses the concept of Indaba, described as the, “traditional social structure of handling and resolving any debate or conflict that may arise within a group.” Khoza (2011) affirms this view in his discussion of community and collectivism as important elements of African Leadership practices, specifically the practice of Ubuntu, where people are not perceived as individuals, but rather as part of a bigger community, a view also shared by Darley & Blankson (2008).

Speaking of his experiences in Mozambique, Respondent G described the, “unique architecture of local thinking” and local legal systems. His experience of how the law can be negotiable was something totally unfamiliar to him from a South African perspective. Amongst the experiences that led him to conclude this was the regulation of an illegal strike that Parliamentary Ministers were discussing, on-going contract negotiations (no end to contract negotiations) and his experience of how police negotiate with thieves. In their discussion on crime in Africa, Fernandez & Kuenzi (2009) discuss the ineffectiveness of local legal systems, a view shared by Games (2010).

Respondent A also spoke about the challenge of local legal systems while on expatriate assignment. One of the challenges he emphasised related to

the issue of driving; his view was that expatriates should not be driving in African countries, but rather make use of local drivers. This was due to the ineffectiveness of local legal systems in the event of an accident and the possibility of South African expatriates ending up in local prisons for months on end without being officially charged, not a practice that aligned to South African norms.

Ultimately, the different ways of doing business in Africa and the mismatch to South African business practices and norms tended to frustrate respondents and posed a significant challenge to conducting business operations and delivering on mandates while on expatriate assignment.

5.3.6. Core Theme 6: Acknowledging and appreciating personal mental models, attitudes and stereotypes

“Whether you think you can, or you think you can’t, you’re right”

Henry Ford²⁴

Value systems and established norms and practices influence the manner in which individuals think and behave, a view substantiated by Fechter & Walsh (2010) who argue that the past influences contemporary behaviour. Thus the previous core theme bears a close link to this core theme on mental models, attitudes and stereotypes of respondents and the challenges that these posed for them while on assignment. Also linked to this core theme is the first core theme regarding the challenge of expatriate adjustment to African culture, norms and practices.

Early research by Maclachlan (1993) and Caligiuri, Phillips, Lazarova, Tarique, & Burgi, (2001) suggest that expatriate managers working in Africa tend to hold on to negative stereotypes of African business and the competency of local employees, thus preventing them from appreciating the value and team effectiveness that can be harnessed. More recently,

²⁴ Leadership quote sourced from internet based search (BrainyQuote, 2013)

cross-cultural training (CCT) has been advocated by El Mansour & Wood (2010) and Chen, Kirkman, Kim, Farh, & Tangirala (2010) as a means to dispel cultural myths and stereotypes and encourage openness and enthusiasm for diverse cultures, thereby managing expatriates' expectations. Ironically Horwitz (2012) comments that in certain cases, despite having the best intentions, these CCT programmes serve to perpetuate these stereotypes.

Respondent F spoke at length about the challenges of mental models and stereotypes, and advocated the importance of being aware of ones' mental models and stereotypes, as these tend to be instinctively applied to unfamiliar situations, thereby limiting the expatriate's ability to embrace different cultural norms and business practices.

According to Respondent F,

“One of the biggest leadership challenges is going into another country with a mental model of what you think it is based on your own value system, beliefs, perceptions or things you heard and I think you often take a South African way of doing business and impose it on other countries”

Respondent G, a senior executive who was based in Mozambique, commented in a similar vein to Respondent F, but went on to further indicate that South African expatriates working in Africa tended to hold onto what is familiar and to approach their assignments with an attitude of superiority. He pointed out that this, “mental model superiority” alienated leaders from local people and negatively disrupted business operations.

The concept of mental model superiority is discussed by Fechter & Walsh (2010, p. 1197) who argue that, “postcolonial continuities in relation to people, practices” permeate the behaviour of expatriates amongst local people and make the case that it is imperative to be aware of the colonial context that may inform and drive behaviour. Respondent G went on to link the attitude of South Africans to the legacy of oppression experienced by South Africans as a result of colonisation and Apartheid.

He described the superior attitude and myopic thinking of South African expatriates working in Africa as akin to that of the abusive and oppressive political leadership legacy that they had experienced, indicating that,

“We have become our oppressors”

Many respondents acknowledged that a poor attitude on the part of South African expatriates contributed to the challenges they experienced. Respondents K, M and N spoke about the challenge facing South African expatriates as a result of their own arrogance demonstrated in African countries in terms of their best practice solutions in business. Respondents also offered a view that one of the leadership challenges facing South African expatriates working in Africa was the poor expectation management and resultant negative attitude, associated with their personal African stereotypes. Chen, et al. (2010) and Games (2010) shared a similar view that the attitude of expatriates was fundamental to their ability to adjust to new environments; expatriates tended to be frustrated by their own expectations that the new African countries they went to on assignment would be the same as South Africa.

Respondents F, G, J M and N offered perspectives around this issue. They emphasised that this type of attitude was unfortunate and limiting as it made South African expatriates blind to the opportunities associated with exploring and embracing new experiences, learning and personal growth and development. Respondent G shared one of his important lessons learnt on his initial experiences in Mozambique, where he had struggled to adjust; he described himself as being in Maputo²⁵ and trying to locate places, while following a map of Johannesburg imprinted on his brain. He shared experiences of his personal change journey that after consciously deciding to let go of the map of Johannesburg, he was able to immerse himself in the culture of Mozambique and soon fell in love with the place.

²⁵ Maputo is the Capital city of Mozambique

Other respondents shared similar stories about their personal change journeys around choosing to have a different attitude towards their assignments. They also offered views that many African countries were beautiful places with warm wonderful people and if expatriates made the effort to humble themselves and be open to new experiences, they would experience fewer leadership challenges while on assignment. Ghana and Kenya were specifically mentioned by respondents as wonderful places that they enjoyed being in.

5.3.7. Core Theme 7: Understanding and managing local market and working conditions

“We start as fools and become wise through experience”

African proverb²⁶

One of more distinctly professional leadership challenge facing South African expatriates working in Africa was getting accustomed to local market and working conditions, which tended to be unstructured and unpredictable, thus differing from what respondents were used to. This posed leadership challenges to successful business operations; many respondents reported being affected by this.

One such element of unpredictability was the volatility of local African markets. Arezki & Nabli (2012) argue that African countries have experienced low economic growth accompanied by high levels of macro-economic volatility. This view is shared by Huang (2012) who emphasises that low-income countries (such as those in Africa) are vulnerable to macroeconomic volatility as does Games (2010) who discusses the business risks associated with currency fluctuations in Africa. Chinzara (2011) and Omojimite & Akpokodje (2010) take this argument further by stressing the link between macro-economic risk and stock-market volatility.

²⁶ African proverb sourced from an internet based search (World of Quotes, 2013)

Respondents agreed that local market volatility made it difficult to predict how business markets would grow, which consequently impacted on effective business planning that respondents were expected to perform. Where sudden market fluctuations and changes occurred, this had a knock-on effect on other dimensions of business operations, such as budgeting and resource allocation, thus making strategic business planning a serious leadership challenge experienced by respondents. These sentiments from respondents are echoed in Hamann, et al. (2008), who argue that doing business in Africa can be difficult due to the unpredictability and complexity of the environment. Respondent F had reported that this was actually the biggest leadership challenge he experienced while on expatriate assignment in Africa.

According to Respondent F,

“When you do strategic or long range planning you have to get a sense of how you think the market will grow and that is important because it determines the level of resources you going to apply and the budgets you going to allocate to the business in order to enable it to grow. But if you have all these variables which are quite challenging and unpredictable, the biggest challenge is determining your strategic plan”

Respondents A and F also discussed the challenge and criticality of effective risk management, to enable successful business operations in an unpredictable market environment. One of the challenges shared by Respondent A was the inability of company head offices in South Africa to understand effective and fit-for-purpose risk management; this will be discussed in greater detail in Core Theme 10. Respondent F emphasised the importance of closely following and understanding local market trends and competitors when choosing risk management strategies to deliver on mandates. There is support from the literature for the approach adopted by Respondent F; Omojinite & Akpokodje argue that exchange rate volatility, “has important implications for trade and growth prospects of countries” as it forces companies to add a risk premium to the cost of goods, which

ultimately impacts their pricing strategy, thus affecting their ability to trade effectively on external markets (Omojimite & Akpokodje, 2010, p. 23).

According to Respondent F,

“So you can choose if you have a low appetite for risk a very low risk strategy but if your competitors are more bullish or more aggressive, you could fall behind so your risk is a loss of market share and you are under-performing in the market. On the other hand if you take a fairly bullish view and you fairly aggressive it comes of great and means you are ahead of the market and you made some strides in your competition. So that's the significant challenge, the overall variables.”

Another leadership challenge facing respondents (and linked to the local market volatility experienced) was the instability of local financial institutions, specifically discussed by Respondents H and F. This was evidenced by the shortage of available local currency and the consequent difficulty in acquiring foreign exchange, often associated with the local market volatility discussed above. Where there tended to be a shortage in local currencies, governments often prioritised where foreign exchange could be deployed, which could negatively impact the business operations of South African expatriates. Games (2010) describes inefficient local banking systems and currency fluctuations as one of the main risks to conducting business in Africa.

Local technical infrastructure was another commonly mentioned variable affecting working conditions of respondents. This included transport and telecommunications and was raised by several respondents, including Respondents A F, H, K and L. Closely linked to the challenges of local living conditions experienced by expatriates and (discussed in core theme 3), these challenges of inadequate local technical infrastructure also had distinct and direct impact on local working conditions and business operations. In support of this challenge, Games (2010, p. 9) discusses the difficult local logistics of doing business in Africa which include, “great

distances, the lack of suitable premises, high rents, weak domestic economies which do not allow for easy local sourcing of requirements, expensive hotels, bad roads, poor infrastructure, unreliable power supplies, a lack of telecommunications, high local taxes, a lack of skilled labour and inefficient banking systems.”

A list of the latest Africa infrastructure indicators from The World Bank Enterprise Surveys may be located in Appendix I. An extract of this information appears in Table 10, showing infrastructure indicators for Tanzania, South Africa and Sub-Saharan Africa.

Table 10: Infrastructure Indicators for Africa (The World Bank, 2012)

Infrastructure indicators from The World Bank Enterprise Surveys (2011)	Sub-Saharan Africa	Tanzania (2006)	South Africa (2007)
Number of electrical outages in a typical month	8.9	9.1	0.9
Average duration of a typical electrical outage (hours)	6.8	7.9	4.5
Average losses due to electrical outages (% of annual sales)	7	9.6	1.6
% of firms owning or sharing a generator	44.3	45.7	18.4
Average proportion of electricity from a generator (%)	26.8	36.8	10.9
Days to obtain an electrical connection (upon application)	33	44.3	15.8
% of firms identifying electricity as a major constraint	49.2	88.4	20.8
Number of water insufficiencies (shortages) in a typical month	2.4	6	0.1
% of firms identifying transportation as a major constraint	26.9	14.1	3.9

Respondents acknowledged that the lack of adequate transport infrastructure had a significant impact on the business costs associated with moving products into different markets. In certain instances, it was

reported that local rail infrastructure was either totally dilapidated or non-existent, thus forcing businesses to utilise trucks to move products. This in turn had other associated risks such as crime and security (discussed in core theme 4) as well as time taken to deliver goods.

The lack of adequate telecommunication infrastructure also posed a leadership challenge to respondents and affected business communication, which in turn affected business operations.

According to Respondent F,

“When you have your people out in the field, getting to them through communication is a problem. For example when I was in Ethiopia, they did not have a cellular network so it was a fixed line capability that the country had. So the ability to communicate affects how you deploy your workforce and your teams and how you able to get through it”

Despite improvements in telecommunication infrastructure, respondents reported that they were challenged by this.

This was also experienced in the data collection process of this study as two telephonic interviews were conducted with respondents based in Nigeria and Ghana. In both instances, the telecommunication link was not always clear and broke on a few occasions, thus impacting cost and time, two essential variables of successful business operations.

5.3.8. Core Theme 8: Conducting effective networking and relationship building

“If you talk to a man in a language he understands, that goes to his head.

If you talk to him in his language, that goes to his heart”

Nelson Mandela²⁷

The above quote from Nelson Mandela about building authentic rapport amongst people is the focus of this core theme namely, expatriates' challenges around conducting effective networking and relationship building while on assignment. Sub themes from the data that reflected this included coping with language barriers, developing networks for business effectiveness and authentic relationship building whilst on assignment.

A major challenge shared by the majority of respondents (including Respondents C, D, E, G, H, I, J, K and L) was their inability to communicate effectively with local people due to language barriers, something that Pires, et al. (2006) describes as oral deprivation, and argues that the ability to communicate is fundamental to expatriate adjustment. Strong links exist between this core theme and others such as Core theme 2, focusing on the change impact on family and core theme 9, (to be discussed) focusing on leading and managing employees.

An interesting point that emerged from the interviews with different respondents was that when they attempted to communicate in local languages, they experienced greater acceptance, as they were perceived to be respectful of local culture, a view supported by Hill (2011). Conversely respondents also discovered that communicating in a different language from that which locals are familiar with (such as Afrikaans), tended to alienate them and caused distrust amongst locals for expatriates.

²⁷ Leadership quote sourced from internet based search (BrainyQuote, 2013)

According to respondent E,

“At the outset, I made a real effort to try to learn the local languages as a means of being respectful to the people and their culture. They respect you when you try. A lot of South Africans made a mistake where 5 of them will be amongst the locals before a meeting and they’ll be talking Afrikaans. To Tanzanians you hiding something if you speak in a foreign language. Rather speak Swahili or English.”

Many of the respondents who commented on this leadership challenge also voiced their willingness to learn local languages, which according to Eichinger (2012) is critical to the expatriates’ ability to build relationships with locals, which positively impacts on their cultural assimilation.

The willingness to learn speaks to expatriate attitude, the importance of which was discussed under Core theme 6. Similar findings from earlier research by Holopainen & Björkman (2005) on the personal characteristics of successful expatriates and from McCroskey & Richmond (1990) indicate that the more the expatriate willingly gets involved in local communication, the better their understanding of local culture and people will be; they argue that, “increased understanding will reduce uncertainty, and increase adjustment and job performance” (Holopainen & Björkman, 2005, p. 41). Of interest to note is Eichinger’s comment that having a willing attitude to learn local languages is considered more important to cultural adjustment and relationship building amongst locals than actual language proficiency (Eichinger, 2012).

In addition to local dialects, French, Arabic or Portuguese was the predominant language in many of the countries that respondents were assigned to. This is arguably attributable to the history of colonisation experienced in Africa (Johnston, 2011; Keller, 2007). Respondent J shared her views on the communication challenges experienced by her husband who had accompanied her on assignment; he was frustrated by his inability to understand what local products in the shops were, thus

making a relatively simple task of buying basic household groceries a challenge. Respondent H also shared his view on the challenge of language barriers within the workplace and the impact it had on management tasks (such as giving direction or delegating tasks). He indicated that while an interpreter may be used, it was nevertheless a big challenge.

According to Respondent H,

“My experience in SADEC and West Africa is that from a leadership perspective...the majority of West Africa is either francophone²⁸ or lusophone²⁹ countries. Language barriers is a very big issue..., locals spoke little or no English. From a management point of view when trying to give directives or establish a project, being able to translate what you want done can be problematic. But that can be easily overcome by the use of a properly trained interpreter. But it is a big challenge.”

Many respondents shared the view that with better pre-departure preparation, the severity of this challenge would have been reduced. There is a plethora of research substantiating the need for better pre-departure expatriate preparation such as (but not limited to) Firth, Chen, Kirkman, & Kim (2013), McEvoy & Buller (2013), Eichinger (2012), Mahajan & De Silva (2012), Okpara & Kabongo (2011), El Mansour & Wood (2010), Chen, et al. (2010), and Pires, et al.(2006)

Not surprisingly, the challenge of basic communication barriers amongst expatriates and locals, contributed to the challenges of networking and relationship building. This was further impacted by the challenge of being perceived as a threat by locals. In essence, expatriates were negatively perceived by locals, as taking jobs away from local people. This was either directly by virtue of being an expatriate in a job or indirectly, by possible

²⁸ Francophone refers to French speaking populations (Google Definition, 2013)

²⁹ Lusophone refers to Portuguese speaking populations (Google Definition, 2013)

decisions such as job changes that expatriates may make to improve business operations. Respondents D and F stressed this as one of the main challenges of South African expatriates working in Africa. Respondent D shared his views on this aspect.

According to him,

“The locals also see you as a threat...wherever you go you’re seen as taking someone’s job. So you have try to win over the locals at the same time as do your job.”

Respondents B, G, H and L discussed their difficulty in trying to get local leadership teams on-board; Respondent N reflected on her challenges to get buy-in from local staff, while Respondent L discussed the importance of making concerted efforts to build relationships and strategising over how to go about it. This was supported by Respondent F, who goes further to link authentic relationship building to the establishment of trust amongst locals, which he argues can help to alleviate some of the challenges of team effectiveness and productivity.

This business operating model, where efficient and effective operations are directly influenced by the extent to which people know and trust one-another, is associated with African methods of conducting business (Littrell, et al., 2013; Newenham-Kahindi, 2009), thus posing a challenge to expatriates in their leadership function. According to Darley & Blankson (2008) greater cultural sensitivity is fundamental for expatriates to demonstrate as it has a direct impact on trust with locals.

Networking and relationship building was also said to be critical to the process of skills transfer; according to Choi & Johanson (2012) the ability to develop sound relationships has a positive impact on the process of skills transfer. This will be further discussed in the next Core theme (9).

5.3.9. Core Theme 9: Leading and managing local and expatriate employees

*“Someone is sitting in the shade today because someone
planted a tree a long time ago”*

Warren Buffet³⁰

This core theme reflects the challenges experienced by the respondents in leading and managing local and expatriate employees while on assignment. As discussed above in core theme 8 some of the leadership challenges affecting expatriates were communication and relationship building; these also had an impact on how they managed and led people.

Respondents C, F, I, J and N specifically discussed the important process of skills transfer from expatriates to local employees and the challenge of inconsistent educational levels and work experience amongst local employees. This was especially pronounced when taking into account the prevailing communication and acceptance challenges experienced by expatriates in their interaction with locals, as discussed in core theme 8.

This made for a significant challenge as mentioned by Respondent I,

“One of the mandates made very clear for expats was that we are going there to impart knowledge to locals. You need to be seen to be doing a good job at transferring your knowledge and skills and improving the quality of skills of the locals and that was challenging....Then we had to from scratch have a training programme for these guys. The challenge was to up-skill them to be good role models in terms of local talent.”

Like Respondent I, E and C also related how they had to develop skills competencies and training programmes for specific site roles as there were no training facilities for site staff, thus severely limiting people

³⁰ Leadership quote sourced from internet based search (BrainyQuote, 2013)

development. In discussing the importance of skills transfer, respondents reflected on the issue of sustainability and the more recent trend of shorter expatriate assignments. This was mentioned by respondent N, who reflected that the historically lengthy tenures of expatriates, (sometime more than ten (10) years) was fast fading to shorter assignments of a few years in length, where expatriates were expected to enrich the country, transfer and develop skills before leaving, thus positively impacting country sustainability.

Wang, et al. (2009) suggest that expatriates with specific competencies who can transfer both explicit and tacit knowledge, thereby enhancing subsidiary performance, can provide firms with a distinct competitive advantage. A year earlier, in their work on inter-organisational knowledge transfer, Easterby-Smith, Lyles, & Tsang (2008) argued that successful knowledge transfer depends on the characteristics of both the source and the recipient of knowledge. According to Change, Gong, & Peng (2012) and Choi & Johanson (2012) and Wang, Tong, Chen & Kim (2009), MNC's use expatriates to transfer skills and knowledge from company headquarters to subsidiaries, such that subsidiary performance may be enhanced. They caution however, that due to the expatriate selection process, often based on technical merit, many expatriates may not be equipped with the soft skills necessary to execute this task effectively. Additionally, knowledge transfer may still prove challenging as locals may not recognise the value in receiving and assimilating skills and knowledge; they define this concept as, "subsidiary absorptive capacity" (Chang, et al., 2012, p. 927).

As discussed in Core theme 8, the lack of trust and acceptance from locals was a challenge experienced by many respondents that directly impacted their ability to manage local staff for performance and delivery, and to transfer knowledge. In sharing their views of how they went about managing this challenge, Respondents E, F and H emphasised the importance of being able to understand the different methods of doing business in Africa, such as the concepts of decision-making by consensus

and collectivism and respectfully associating with locals to foster and develop trust.

According to Respondent F:

“When you are trying to do business in an African country, you may be frustrated by the time it takes to get going...Locals believe, *“you are the kind of person we trust, we know who you are, we understand where you coming from, then we are happy and prepared to do business with you”*...they want to know who they are doing business with first and come to a level of comfort and confidence that you are the person they want to do business with.”

This type of operating model for doing business made it challenging to manage people, as it tended to delay processes and decisions. However, there was also acknowledgement from respondents that in order to get things done, without alienating local staff and service providers, they had to come to terms with the mind-set of collectivism and communalism that characterises African culture as discussed by Littrell, et al. (2013, p. 236). Littrell, et al. (2013) go on to argue that group solidarity and relationship building are the corner-stones of African values embraced across Africa defining how people think and interact with one-another. This was also echoed in the work of Bangura (2005) who argues that Ubuntu is the spiritual foundation of sub-Saharan societies. Newenham-Kahindi (2009) also believes that the concept of Indaba, (based on collective decision making and conflict resolution) has implications for people management and decision making.

An interesting challenge that emerged from the data was how to manage lack of delivery from local employees on the mines, considering that those expatriates were not allowed to engage in confrontation of any kind (in order to attempt to maintain a harmonious working environment within the close confines of the mine and camp sites). As discussed in the first core theme on unique African culture, norms and practices, respondents felt

challenged by their perception of a lazy local work ethic. Respondent E shared that he had to employ a local supervisor to directly confront and engage employees. Also, it helped that there was greater acceptance for local supervisors, compared to expatriate employees.

Managing local employees was further complicated by power struggles and organisational politics; this created several challenges in optimal team functioning and affected the respondents' approach to leadership and management. In their model on inter-organisational knowledge transfer, Easterby-Smith, et al. (2008) specify organisational power relations as one of the dynamics faced by expatriates, that could impact knowledge transfer and by implication expatriates' ability to fulfil their mandate. One of the ways in which this type of power struggle played, was with regards to contract negotiation; locals were relied on for communication interpretation, which tended to frustrate contract negotiation and finalisation. Respondents also discussed the challenges associated with team establishment in Africa. Respondents A and I discussed the importance of ensuring that effort is invested into selecting the right individuals and the technical and HR challenges that accompanied the process.

The discussion on the challenges facing South African expatriates managing and leading local employees in Africa would not be complete without highlighting the case of Respondent J and her commentary around sexually mutilated women, (initially discussed under Core theme 1) relating to African culture, norms and practices. In addition to the challenge of adjusting to different cultural practices, Respondent J had a leadership challenge in managing these women, whose medical trauma demanded monthly time off for being unwell and unfit to work. This impacted business deliverables and had to be carefully planned around. Also, it was unfamiliar territory for a South African leader (unaccustomed to such locally acceptable practices) to navigate the demands of their role while trying to remain respectful of and sensitive to cultural differences, demanding a high-level of cultural intelligence (CQ). The research by

Groves & Feyerherm (2011) on the impact of leader cultural intelligence (CQ) in culturally and ethnically diverse contexts, on follower behaviour, indicated that this surpassed the effects of emotional intelligence (EQ) and other leadership competencies.

The last sub-theme emanating from the data around leading and managing people was around the leadership challenge of keeping expatriate staff motivated during assignments. Respondents A, B, E, H and J referred to the loneliness and depression that was experienced by their expatriate employees (and themselves personally) over time. In his study on homesickness and the coping strategies of expatriates, Hack-Polay,(2012) draws attention to the negative effects thereof and argues that while research on expatriates tends to focus on many different elements of adjustment, little emphasis is paid to the impact of homesickness. He describes homesickness, which manifested as depression, stress, fatigue and illness as potentially detrimental to the well-being of expatriates.

Respondents described similar situations and acknowledged that if unmanaged, this posed a risk to productivity and ultimately team effectiveness of the departments and projects being managed and led by them. This challenge was akin to a double-edged sword for expatriates as very often, while trying to keep their expatriate employees motivated and energised about their situation, they were also managing similar symptoms within themselves.

Respondent E referred to the depression experienced in mine camps while Respondent B cautioned against allowing expatriates to live for extended periods of time in a hotel room, as in his experience this self-enforced isolation contributed to expatriates becoming depressed and de-motivated. Respondent J recounted her own personal change journey on her different expatriate assignments in Africa and explained how excited and enthusiastic she was at the beginning of her different assignments, (arguably a honeymoon phase). Thereafter she reported how, after a period of time, the reality of her situation sank in and she experienced a

period of depression before finding a balance to come to terms with and deal with her realities.

According to Respondent J,

“So normally when you start of the posting you are excited, it’s new, you want to try new things but then after six months you’ve moved into your house, life is back to normal, you gotta feed your children, do the dishes, normal everyday things and that’s when you start missing home. So from the 6th – 9th month you feel a little depressed or homesick and I felt this in every posting that I was, except in Mali where I felt that forever.”

The process of helping employees to manage their personal adjustment has research and literature to support the process of transformation; one such model is the U-shaped model to manage culture-shock offered by Pires, et al. (2006) that was presented and discussed in Chapter 2, clearly outlining the honey-moon stage and culture-shock described by Respondent J.

Another model designed to help manage personal transformation is the interchange model of Brock & Salerno (1994), (located in Appendix F) that clearly outlines what to expect in the various phases of personal transformation. Leaders and employees need to understand this model of the cycle of human/ personal change in order to best support their employees and appreciate their role in ensuring that the cycle is completed. This model will arguably also personally benefit expatriates, by empowering them to understand the personal transformation phases they may be going through.

5.3.10. Core Theme 10: Enabling business operations amidst lack of support from home country head office

“There are none so blind as those who will not see”

English proverb³¹

One of the most prevalent themes that emerged from the data was how respondents were expected to enable business operations and performance in the absence of adequate support from home country head office. With the exception of Respondent N, (who had four months of experience at the time of being interviewed) all respondents made reference to this. Sub-themes in this core theme included the lack of effective pre-departure on-boarding, the disconnect and lack of urgency demonstrated by home country³² head-office for realities experienced by expatriates, organisational politics from head-office that affected efficient and effective delivery of expatriate assignments and the internal organisational processes and systems that affected expatriates, such as their company's Human Resources recruitment and contracting processes.

According to Kuo (2012), Okpara & Kabongo (2011), Avril & Magini (2007), Pires, et al. (2006) and Holopainen & Björkman (2005) appropriate pre-departure training of expatriates is a critical enabler of improved adjustment in host countries, which contributes positively towards overall success and they advocate cross-cultural training as an essential component of this on-boarding process many respondents criticised their parent companies for the lack of effective pre-departure on-boarding, (the lack of which was said to have resulted in several challenges to their ability to adjust and acclimatise to new working environments). Where expatriate on-boarding, orientation and training programmes were offered to respondents, these were perceived to be too generic in nature and thus not fit-for-purpose. These views are

³¹ English proverb sources from internet based search (The Phrasefinder, 2013)

³² Home-country is a term used to describe expatriates' country of origin. For the purposes of this research report, home country refers to South Africa

concomitant with those of Kuo (2012) and Avril & Magini (2007) who suggest that basic pre-departure expatriate training is insufficient and inadequate to support expatriates for real-life situations they may encounter while on assignment; they advocate a more experiential approach to on-boarding and training programs.

Respondents D, E, F, H and L shared views on the challenges resulting from a lack of effective pre-departure on-boarding. An example of this was the lack of appropriate language tuition provided before expatriates embarked on their assignments thus compromising their ability to communicate in their country of assignment. Another example was the lack of experiential pre-departure on-boarding provided in many (though not all) cases. A few respondents did acknowledge that their companies had enabled them to have a look-see visit³³, which helped tremendously in terms of better understanding the country and reducing anxiety. ; In one or two instances, spouses were allowed to accompany their partners on these visits, which were reported as immensely beneficial, but this was not the norm.

An interesting and commonly raised sub-theme within this core theme was a lack of urgency and sense of disconnect that respondents experienced from home-country head office. Respondents A, B, D, E, L, H and J all commented on this; in other words, the failure of head-office to appreciate the realities and challenges affecting expatriates and their consequent inability to render fit-for-purpose and required support. A simple example of this was shared by Respondent A, who commented on the inadequate approach adopted by company head-offices towards risk management and the leadership challenges this brought about for expatriates. His view was that head offices viewed risk management as a financial evaluation, where better cost efficiencies were thought to reflect better risk management. Referring to head office as, “bean counters”, Respondent A

³³ A look-see visit was described by respondents as the opportunity provided by their company to visit the country of assignment for a few days before accepting the assignment, in order to reduce anxiety levels associated with adjustment. In certain cases, spouses could accompany their partners on the visit.

emphasised the failure of that approach to adequately support expatriates and cited the following example of travel to illustrate this.

Time, cost and quality of business operations may be compromised due to poor road infrastructure and crime associated with road travel that could impact the security of people or goods travelling over-land. In the light of this, he reflected that sometimes it may be wiser to charter a helicopter for enhance efficiencies around expatriate travel. While being an admittedly more expensive travel option in the short-term (as opposed to renting a vehicle to traverse the overland terrain), it was also a safer and quicker option. However his view was that head office was unable to understand the severities of expatriate realities and their needs or quantify the benefits realisation and return on investment with a more lateral approach; hence the perceived disconnect and failure to manage real risks.

Other respondents shared similar views; they perceived head office to be disconnected from expatriate realities by a lack of urgency demonstrated in communications and in dealing with requests made by respondents. At the heart of this was a perceived lack of understanding (from head office) that business infrastructure and operations norms taken for granted in South Africa were not always applicable in Africa. For instance, telecommunications or turn-around times had to take business context into account; home-country head offices were said to be blind to this. Thus respondents reported that one of their main challenges as South African expatriates was a distinct lack of support from home-country head office and the, “*out-of-sight-out-of-mind*”³⁴ mentality that set the tone for their interactions. Human Resources (HR) departments were specifically criticised for this.

Research and literature on the lack of support from parent company head-office for expatriates is limited; however a 2007 study by Collings, et al. on the changing patterns of global staffing and the challenges of expatriates,

³⁴ “out-of-sight-out-of-mind” mentality refers to failure to acknowledge something that is not directly within ones line of sight

does high-light the specific lack of HR support; they state that as a result of inadequate HR support from the parent company, “managers are often expected to assume responsibility for their own training and development (Collings, et al., 2007, p. 208) . Also a more recent study by Lui, (2009) indicates an association between the extent to which expatriates are supported by their organisations and the commitment they felt and demonstrated.

Respondent D offered a perspective on this; according to him,

“We had a really bad HR department, so HR is a swear word in our language. When we arrived there, they showed us their true colours and they weren’t interested in us.”

Respondent D and E went on to illustrate the lack of support from head office for the process associated with acquiring work permits and visa, which had impact on business operations.

According to Respondent D

“In fact when I was in Botswana, they left me hanging for 3 years without a proper work permit, and I thought it was normal. I had to go to the immigration and get a new stamp every month for 3 years. That’s how HR works.”

It was interesting to note that the challenges faced by expatriates regarding visa and work permits and the lack of support from home country head-office were not echoed in the literature. Shaffer, et al. did acknowledge the challenges faced by expatriates regarding obtaining visas and work permits, however they took for granted that parent companies would intervene to provide the necessary support needed by expatriates, (Shaffer, et al., 2012).

The research findings reveal that this theory was not practiced. For respondent E, the issue around visas and work permits was the biggest

leadership challenge he experienced, impacting stress levels and down-time for the project (as he had to try and resolve the issue).

According to Respondent E,

“My company actually allowed my work permit to elapse...and Home Affairs came to arrest me... I was very fortunate that the guy was not in uniform... I called the local site manager and he challenged this guy and said *“you are not in uniform and you do not have anyone accompanying you and you cannot continue with this arrest”*. So they guy went to get someone and then I hid for 3 days on the mine...afterwards I flew out to Dar es Salaam and I stayed in the Southern Sun for 26 days waiting for a new permit. I could not leave the country because as soon as I entered the airport they would have arrested me. That was my biggest challenge.”

Respondent I shared his view on why he also believed head office was disconnected from expatriate realities on the ground and the challenges this presented. In particular, he commented on the, “us vs. them” polarised mentality experienced from head-office, in keeping with the, *“out-of-sight-out-of-mind”* approach discussed earlier. For instance, he removed from the company email network, as he was no longer physically located at head office, but rather, in Mozambique. Describing the approach as one of a, “silo mentality”, Respondent I criticised the lack of integrated company systems and the leadership challenges that ensued from this.

Related to this challenge from home-country head office was the organisational politics in head office that affected operations on expatriate assignment. Respondent D was frustrated by the pervasiveness of head office organisational politics and how prone head office was to making assumptions about expatriate assignment conditions. Management decisions based on those assumptions posed challenges to respondents as they were not always relevant or fit-for-purpose.

Respondent C was critical of the lack of clearly defined rules and processes provided by head-office; in his opinion this could have greatly supported his adjustment. Respondent M also commented on this, specifying the lack of direction and role-clarity provided by head office, which impacted his performance.

The challenge presented by head office process and systems was further discussed by Respondent I in terms of employment contracts; while in keeping with the current trend towards shorter expatriate assignments, (as discussed above in core theme 9) he was of the view that the structure of head office employment contracts had no measure of consistency built in. As a result he felt as if he was constantly living in limbo and unable to plan properly. This affected his domestic situation as he was unwilling to up-root his family without something more consistent. In his discussion on, “perceived organisational support” (POS) and associated expatriate organisational citizenship behaviour, Liu (2009, p. 63) argues that expatriates who perceive a high degree of organisational support are more likely demonstrate their commitment, thus positively impacting overall performance.

An interesting sub-theme linked to the challenge of perceived lack of support from home country head office was the processes associated with recruitment, selection and succession planning of expatriates. From their experience, Respondents A and K commented that failure to select appropriate candidates can compromise the entire assignment and advocated the importance of selecting the right candidates should never be underestimated as it had a direct and significant impact on project team effectiveness and work output; the consequences of expatriate failure in terms of time, cost, quality and team effectiveness were extensive.

According to Respondent K,

“So you are either made for expat or you are not. The people come and try it out and if he doesn’t fit in then he will ship out”

Support may be found in the research and literature for appropriate expatriate selection processes and procedures, with a growing trend to move away from the traditional focus on technical competencies to a focus on intercultural skills (Avril & Magnini, 2007; van der Heijden, et al., 2009), referred to as cultural intelligence or QC (Ng, Van Dyne, Ang, Ryan, & Oswald, 2011; Rockstuhl, Seiler, Ang, Van Dyne, & Annen, 2011).

5.3.11. Conclusion regarding the Research Question

In shedding light on the research question, the findings may be clustered around ten (10) interdependent and multi-dimensional themes, covering both personal and professional challenges. This indicates that the leadership challenges faced by South African expatriates working in Africa do not function in isolation of one another; instead they act interdependently of one another, with critical integration points and enabling elements, thus demanding an integrated, multi-dimensional approach to managing them such that South African expatriates' experiences in Africa are improved.

5.4 Conclusion

This chapter began with a discussion around the demographic profile of the research respondents, which was important to examine as elements of the profile may have influenced the views espoused by respondents. The results were thereafter discussed in the form of ten (10) core themes reflecting the main leadership challenges facing South African expatriates working in Africa.

Appropriate research and literature in addition to the opinions and commentary from respondents was used to substantiate the research results put forward. Respondents shared their views from a personal and professional perspective. They also gave feedback on what they believed their biggest leadership challenge was which may be of interest to peruse.

The core themes raised in each interview, including an indication of the biggest leadership challenge experienced per respondent, is located in Table 11 below. It provides a high-level picture of all the respondents' perceptions regarding the leadership challenges faced by South African expatriates working in Africa.

Table 11: Consolidation of leadership challenges of respondents

High-level over-view of leadership challenges per respondent (as per Core theme), including biggest Leadership Challenge experienced								Biggest Leadership Challenge = 		
Respondent	Core theme 1	Core theme 2	Core theme 3	Core theme 4	Core theme 5	Core theme 6	Core theme 7	Core theme 8	Core theme 9	Core theme 10
Confidentiality and anonymity was guaranteed to respondent, hence the use of an alphabetized pseudonym	Adjusting to the uniqueness of African cultures, norms and practices	Managing the change impact of expatriate assignment on family	Adapting to local living conditions while on assignment	Understanding the prevalence of crime and corruption and the impact on business leadership	Delivering on business mandates while managing the mismatch of SA norms within an African context	Acknowledging and appreciating personal mental models, attitudes and stereotypes	Understanding and managing local market and working conditions	Conducting effective networking and relationship building	Leading and managing local and expatriate employees	Enabling business operations amidst lack of support from home country head office
A										
B										
C										
D										
E										
F										
G										
H										
I										
J										
K										
L										
M										
N										

Each core theme was made up of different sub-themes. Altogether sixty-five (65) codes were identified in the data. While the ten (10) core themes are presented as separate, they are not independent of each other. Distinct interdependencies and integration points emerged in the discussion amongst the core themes; these were clearly pointed out and discussed. Working together, these interdependencies may be referred to

as a vicious circle of expatriate failure, as depicted in the figure below, illustrating how core themes feed into the process, based on the research findings.

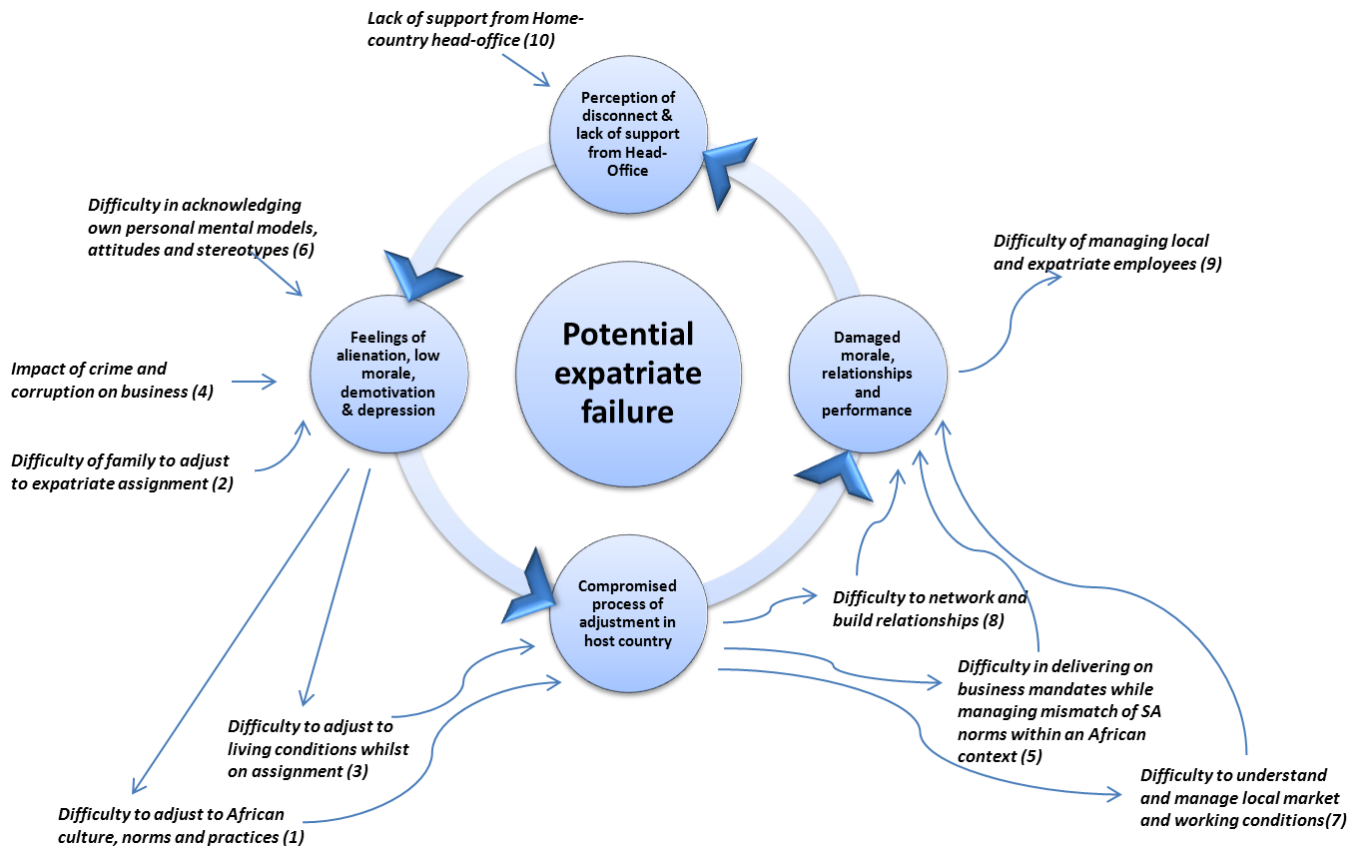


Figure 9: Vicious circle of expatriate failure

The research results thus concludes that the leadership challenges facing South African expatriates working in Africa may be clustered around ten (10) interdependent and multi-dimensional themes, covering both personal and professional challenges. As such, these leadership challenges demand an integrated and multi-dimensional approach to addressing them, such that, going forward, it makes a meaningful difference to improving the experience of South African expatriates working in Africa.

CHAPTER 6: CONCLUSIONS AND RECOMMENDATIONS

6.1 Introduction

This chapter begins by briefly outlining the research report structure. The report began by providing the purpose and context for the study. The problem statement was defined at the beginning of the report, followed by an overview of the assumptions made, possible delimitations and the significance of the research for four main stakeholder groups; namely South African expatriates working in Africa, managers of these expatriates based at South African head-offices, South African MNC's wanting to branch out into the African continent and HR practitioners based at head-offices, playing a support role to these expatriates.

A detailed overview of the literature was provided, focusing on globalisation trends and the implications for global talent management followed by an overview of leadership paradigms and trends applicable in the international business space. Thereafter the leadership challenges of expatriates (in general) were discussed, followed by a discussion on the uniqueness of doing business in Africa and the leadership challenges of expatriates assigned to African countries. Lastly the literature review touched on those leadership challenges faced by South African expatriates working in Africa however current research on this subject of research is limited, thus revealing a gap that this study hopes to bridge.

The study's phenomenological qualitative research methodology was discussed next, outlining the semi-structured interview process to be followed and the process of thematic analysis to analyse results. This was followed by a discussion on the demographic profile of the 14 research respondents interviewed. The industries covered by the respondents were Consulting and Project Management, Fast Moving Consumable Goods, Government and Public Utilities, Telecommunications and Aviation. There was a majority of White male respondents; with twelve (12) male

respondents and two (2) female respondents in total. The majority of respondents were classified as Top management and were above 40 years old.

The research results were discussed next, revealing that leadership challenges facing South Africa expatriates may be clustered around ten (10) multi-dimensional Core themes that do not function in isolation or independently of each other, but rather in an integrated manner, thus demanding an integrated and multi-dimensional approach to addressing them.

The findings also revealed that there is a lack of current research and literature into the challenges facing South African expatriates working in Africa. In the available research on South African expatriates (not specifically focused on working in Africa), Vogel & Van Vuuren (2008) concluded that all South African expatriates require the same preparation, support and training, irrespective of the differences associated with their assignments, their age and their level of experience. The findings of this research differed, emphasising instead the significance of context specific preparation, support and training for South African expatriates working in Africa. The findings also differed from that of Shaffer, et al.(2012), who took for granted that expatriates would be supported by their home country head-offices. Instead, the findings from this study revealed that for the vast majority of respondents, this was not the case.

The focus of this chapter is on the conclusions and recommendations for the study. In addition to a summary of the main leadership challenges faced by South African expatriates working in African an integrated and multi-dimensional response strategy, is proposed in the form of recommendations per significant stakeholder group, to improve the experience of South African expatriates working in Africa. Finally, this chapter concludes by offering suggestions for further research that can contribute to growing the body of knowledge around this topic.

6.2 Conclusions of the study

The increasing trend of globalisation has implications for companies wanting to do international business and their global talent management approach. As greater interest focuses on doing business in developing countries, research into leadership challenges associated with this, become critical to undertake.

For this research, conducted amongst South African expatriates working in Africa, the findings have been categorised into ten (10) Core themes covering leadership challenges from a personal and professional perspective.

Core theme 1 focused on the challenge of adjusting to the uniqueness of African cultures, norms and practices. Sub themes included adjusting to diverse religious and cultural practices, an unfamiliar work ethos and a lazy local work ethic. Respondents reported experiencing a significant culture shock as nothing was the same as in South Africa.

Core theme 2 focused on the challenge of managing the change impact of the expatriate assignment on family (spouses and children). Sub themes included spousal adjustment, general family adjustment and issues pertaining to education and school systems for children. In keeping with the literature, respondents reported that one of the biggest challenges that affected expatriate success was the impact it had on the family and how this was managed. It was argued that accompanying spouses had a bigger adjustment challenge than the expatriate.

Core theme 3 focused on the challenge of adapting to local living conditions while on assignment. Sub-themes included inter alia extreme weather conditions, poor medical and health-care facilities, shocking road infrastructure and the lack of entertainment. In general, respondents found it difficult to adjust to living conditions far removed from what they were accustomed to in South Africa.

Core theme 4 focused on the challenge of crime and corruption and the impact on business leadership. Sub-themes included theft and kidnapping. While the threat of kidnapping was not a frequently mentioned challenge, it was significant enough to include, in line with the guidelines of thematic analysis. Another element of crime and corruption pertained to political unrest and rebel activity in African countries. These challenges impacted on business leadership and operations.

Core theme 5 focused on the challenge of delivering on business mandates while managing the mismatch of South African norms within a uniquely African context. Sub-themes included the lack of governance and controls in many African countries, the acceptable methods of conducting business such as the payment of facilitation fees (perceived to be corrupt by respondents), the local legal systems and the lack of applicability of South African norms within the environments that expatriates found themselves in. While closely linked to the theme of crime and corruption, this theme distinguished unique African business practices from South African methods of conducting business.

Core theme 6 focused on the challenge of the personal mental models, attitudes and stereotypes held by expatriates and how this impacted their personal adjustment and delivery on business mandates. Sub-themes included arrogant nature of South Africans expatriates who believe they are better than locals and the oppressive colonial behaviour demonstrated by expatriates, which served to alienate them and frustrate their adjustment. Respondents admitted that once they acknowledged their own mental models and stereotypes towards Africa, they were able to better understand and manage their leadership challenges around this.

Core theme 7 focused on the challenge of understanding and managing local market and working conditions. Sub-themes included the instability of local financial institutions and the volatility of local markets, thus impacting on the respondents' ability to effectively perform strategic business planning. Consequently, local market volatility impacts diverse elements of

the organisational supply chain, thus challenging leaders to better understand the subtle nuances of local markets.

Core theme 8 focused on the challenge of conducting effective networking and relationship building. Sub-themes included the lack of acceptance from locals and communication barriers, most notably illustrated by the inability of expatriates to communicate in local languages. It was widely accepted by respondents that business operations could be easier facilitated with improved local networking.

Core theme 9 focused on the challenge of leading and managing local and expatriate employees. Sub-themes included local skills development and transfer required, the challenge of establishing work teams, accommodating local employees whose cultural practices affected the working environment (such as polygamous practices) and the challenge of keeping expatriate staff motivated and energised to avoid depression.

Lastly, Core theme 10 focused on the challenge of enabling and running successful business operations amidst the lack of support from home country head office. Sub-themes here included the silo mentality and lack of urgency manifested by head office for expatriate realities on the ground. Home country head offices were perceived to be completely disconnected from the expatriate process and in some cases, unwilling to offer support.

These themes do not work independently of one-another; instead they are multi-dimensional in nature, with distinct points of interdependency. As such, these leadership challenges demand an integrated and multi-dimensional response strategy to address them, anchored in strategic partnerships across diverse stakeholders.

Going forward it is hoped that this will make a meaningful contribution to collectively improving the experience of all South African expatriates working in Africa.

6.3 Recommendations

As pointed out in Chapter 1 of this research report, a variety of stakeholders will benefit from the significance of this research and the recommendations provided. These stakeholders are:

- South African expatriates based in Africa,
- South African MNC's doing (or considering doing) business in Africa,
- Head-office HR practitioners who support expatriates working in Africa,
- Host Country Nationals employed at South African MNC subsidiaries within Africa, and,
- Families of South African expatriates working in Africa.

Fifteen (15) recommendations have been proposed per stakeholder group, to holistically address the leadership challenges facing South African expatriates working in Africa. These recommendations range from broader suggestions around concepts such as stakeholder management and relationship building to more specific initiatives that may be implemented, with suggestions for project names such as Oomph!, a holistic expatriate health and wellness programme, an Expatriate Leadership Development Programme (ELDP) or a WILD @ Heart expatriate blogging site to share experiences.

On their own, each recommendation can positively impact the experience of these expatriates, however when considered collectively and authentically, this holistic approach will enable overall sustainability of the solution may be enhanced.

These recommendations per stakeholder group are presented below in Table 12.

Table 12: Research recommendations for different stakeholders

Stakeholder	Recommendation
Multi-National Companies (MNC's) doing business (or considering doing business) in Africa	Review and revise organisational structures for business strategy relevance
	Pursue powerful partnerships with internal and external stakeholders for improved knowledge and management of expatriates
	Enable internal and external stakeholders to conduct and contribute to relevant diagnostic tools
HR practitioners who support expatriates working in Africa HR practitioners who support expatriates working in Africa	Review and revise expatriate selection process for relevance
	Implement holistic Global Talent Management strategy and framework
	Implement holistic and integrated multi-phased Expatriate Leadership Development Programme (ELDP)
	Provide Organisational Development (OD) support for teams
	Implement holistic Expatriate Health & Wellness programme (Oomph!) in partnership with registered dietitians, psychologists and physical trainers
	Review and revise Remuneration & Benefits (R&B)
Host Country Nationals at South African MNC's in Africa	Improve local on-boarding of South African expatriates by using a Buddy System of local mentorship and coaching
Families of South African expatriates	Engage in community integration with locals and other expatriates once in home country
	Consciously choose your attitude towards the expatriate and the overall experience
South African expatriates based in Africa	Give Africa a chance; choose your attitude and choose to embrace the experience and share with others (create WILD @ HEART blog)
	Acknowledge importance of role in Stakeholder Management
	Contribute to growing a body of knowledge around SA expatriates base in Africa

For best effect and benefits realisation for all stakeholders, an integrated and multi-dimensional response strategy is proposed to address these broad recommendations. A list of enabling initiatives have been suggested to effectively action the recommendations, with an accompanying indication of the likely impact. The researcher has branded this integrated response framework as the “*Who-What-How-WOW!*” model of Leadership success for South African expatriates working in Africa. It is detailed in Table 13 below running over the next three (3) pages.

Table 13: The researcher's "Who-What-How-WOW!" model

Who-What-How-WOW! <i>An Integrated & Multi-dimensional Response Strategy To Enable And Empower Critical Stakeholders To Effectively Address Leadership Challenges Of South African Expatriates Working In Africa</i>			
Stakeholder (WHO?)	Recommendation (WHAT?)	Enabling Initiatives (HOW?)	Impact (WOW!)
MNC's doing business (or considering doing business) in Africa	Review and revise organisational structures for business strategy relevance	Establish and ring-fence internal Centre-of-Excellence (CoE) dedicated to supporting expatriates and their families, in partnership with other organisational functions (e.g. HR, IT etc.). Expatriate CoE must be equipped with a call centre and accurate data-base of expatriate information	Will ensure a dedicated organisational focus on expatriates, their needs and challenges, and how to go about best supporting them, such that the organisation's international business strategy and priorities are enhanced. Will feed into organisational Global Talent Management Strategy
	Pursue powerful partnerships with internal and external stakeholders for improved knowledge and management of expatriates	SA MNC's to collectively pool resources (time & money) within an established governance framework to fund and establish SANE (AFRICA) i.e. South African Network for Expatriates (with focus on Africa)	Will enable effective integration, networking and organisational learning amongst SA MNC's re: expatriate management. Will enable the establishment of a centralised repository of diverse data from which all participating MNC's can benefit
		Co-design and sponsor annual SANE (AFRICA) conference Conference location to be rotated amongst African countries in which SA expats are based; all expatriate stakeholders to attend	Will bring together SA expatriates from around Africa for networking, peer-learning, exposure to latest trends, etc. Will improve knowledge of expatriate experience and enhance understanding for how best to manage and support expatriates in Africa
		Establish commercial enabling agreements with panel of travel agents with negotiated special rates for expatriates and their immediate families	Preferential rates and discounts for African holiday packages for expats and/ or their families. Also preferential rate for families of expatriates wanting to visit with them Will impact morale and motivation all round.
		Establish enabling contract with panel of service providers(e.g. Makro) to prepare Quarterly Care Packages for expats, consisting of famous non-perishable SA brands e.g. Ouma & Cape Cookies Rusks, Rooibos Tea, Mrs. Balls chutney etc. (Special care packages for expatriates' birthdays)	Quarterly Care packages will serve as a treat to expatriates and their families, who may be longing for a taste of home; these packages may be customised to personal tastes. Will impact morale and motivation all round
		Invest in host-country CSI/ CSR initiatives under the banner of "Growing Africa" ; expats must be performance compacted to drive these initiatives locally	Will ensure expats get involved in the community and be less prone to feelings of alienation, builds local relationships and networks, positively contributes to country development, fosters integration
		Establish relationship with local South African embassies	Will enable access to established networks, assistance with country dynamics
	Enable internal and external stakeholders to conduct and contribute to relevant diagnostic tools	Provide SANE (AFRICA) with accurate data on expatriates to create a comprehensive data-base such that country-wide diagnostics (e.g. Africa survey) may be confidently undertaken	Access to expatriates based in Africa will allow SANE AFRICA and MNC's to encourage greater survey participation, impacting reliability of results.
		Internally drive and promote participation of survey from own expatriates; ensure survey link is available on internal intranet.	Diagnostics can share significant insights to improve expatriate management process

Stakeholder (WHO?)	Recommendation (WHAT?)	Enabling Initiatives (HOW?)	Impact (WOW!)
HR practitioners who support expatriates working in Africa	Review and revise expatriate selection process for relevance	Develop personality profile for expatriates working in developing countries and the necessary development mechanisms to close the gap (in partnership with psychologist;	Will empower International Business managers to make an appropriate selection decisions, taking relevant characteristics and competencies into account. Will reduce the risk of expatriate failure.
		include psychologist in the selection process	Will ensure the appropriate and relevant emotional competencies are assessed
		Approve a “Look-See” visit for expatriate and family as part of selection process	Expatriate and spouse will be able to make an informed decision before deciding to accept the appointment, with greater confidence
	Implement holistic Global Talent Management strategy and framework	Review and revise Global Talent Management strategy focusing on creating talent pools, succession planning, mentoring, coaching, retention and performance management	Will ensure element of sustainability to MNC; enables MNC to mitigate risk regarding Talent Retention and enables effective performance management (partnering for performance).
		Develop competency framework for expatriates working developing nations	Will empower International Business managers
	Implement holistic and integrated multi-phased Expatriate Leadership Development Programme (ELDP)	Design , develop and implement holistic expatriate training strategy adopting bended learning methodology (incorporate e-learning, experiential learning, social-media platforms and class-room style lectures, simulations)	Will enable improved preparations that will positively impact expatriate adjustment, thereby reducing the risk of expatriate failure
		ELDP Phase 1 (Boot-camp): Internally identified candidates to undergo a 6 month generic group training programme covering the following modules, in preparation for the future roles as expatriates: <i>Project Management, Emotional Intelligence (EQ), Cultural Intelligence (CQ), Skills Transfer, People Management, Diversity Management, Change Management, First-Aid, African leadership, Stakeholder Management</i> NB: Toolkits for practical application must accompany each of the programme modules and experiential simulations to be used to enhance programme effectiveness	Enables the business to identify and groom a pool of potential expatriates Phase 1 Boot-camp: Generic training will allow potential expatriate to get exposure and awareness for the leadership demands, joys and challenges facing expatriates; this will reduce anxiety of the unknown and allow candidates to be better prepared.
		ELDP Phase 2 (Changing Gears): Once expatriate has been selected, context specific personal pre-departure training must incorporate the following : Politics 101, Language training, Cultural Etiquette, including Phase 1 mini refreshers NB: Include spouse and/ or family in training; ensure home-country mentor is identified	Context specific pre-departure training must focus on personal attention for the expatriate and their family for country-specific up-skilling; this will enable the expatriate and their family to have greater confidence that they have an indication of what to expect and are able to communicate (if only basically).
		ELDP Phase 3 (Keep it Real): Once expatriate has relocated, on-the-job coaching to be provided by host and home country mentors NB: Ensure support for spouse/ family, ensure host-country mentor is identified	Real-time support for expatriates and family including access to local mentors and support groups will reduce feelings of anxiety and enhance overall adjustment to host-country
	Offer Organisational Development (OD) support for teams	OD practitioners to partner with expatriates to customise team effectiveness interventions e.g. Team-building as per need.	Will enable expatriates to be better prepared to navigate their leadership roles within their teams for overall effectiveness

Stakeholder (WHO?)	Recommendation (WHAT?)	Enabling Initiatives (HOW?)	Impact (WOW!)
HR practitioners who support expatriates working in Africa	Design and implement holistic Expatriate Health & Wellness (H&W) programme (Oomph!) in partnership with registered dieticians, psychologists and physical trainers	Customise Oomph! H&W programme for expatriates and their family; utilise available platforms (Skype, email, podcasts, visits etc.) to keep in touch; include dietary tips and recommendations from dietician based on availability of local products and from physical trainer on exercise and supplementation for optimal nutrition. Include access to psychologists and counsellors (e.g. establish a 24/7 hot-line) for expatriate/spouse/ family	Will facilitate increased physical, emotional and mental stamina for expatriates and families to cope with and adjust to new environment, thereby improving odds of overall expatriate success. Also expatriates will have access to qualified personnel to discuss their H&W concerns and issues
	Review and revise Remuneration & Benefits (R&B)	Focus on incentives, e.g. introduce monthly allowance (Expatriate Premium) and a retention bonus (paid at end of assignment)	Will incentivise expatriates financially; can improve expatriate retention when used in conjunction with other recommendations
Host Country Nationals at South African MNC's in Africa	Improve local on-boarding of South African expatriates (Buddy System)	In collaboration with MNC's and SANE (AFRICA) establish a community forum of Host Country Nationals to provide local on-boarding, mentorship and coaching to facilitate cultural integration of expatriates	Empowers expatriates to develop local networks and greater cultural sensitivity and acceptance. This will impact on the cultural integration of the expatriate.
Families of South African expatriates	Participate in community activities with locals and other expatriates	In partnership with SANE (AFRICA) establish local host country expatriate network (can include monthly family days); get involved in MNC sponsored CSI/ CSR community projects	Will facilitate networking and socialising and greater cultural integration , thereby enhancing adjustment
	Consciously choose your attitude to the expatriate and the overall experience	Make use of available support structures (hotlines, counsellors etc.); participate in the training provided, keep open channels of communication with expatriate spouse	More authentic engagement will lend to better support and adjustment
South African expatriates based in Africa	Give Africa a chance; choose your attitude and embrace the experience, Share with others (WILD @ HEART blog)	In partnership with SANE (AFRICA), establish and/ or contribute to a blogging site to share real-time, on-line experiences in Africa such as Beautiful places to visit, Top Tips, videos, photos e.g. Tennis racquets are great to get rid of bats (their SONA can't pick it up!).	Fosters an on-line community of shared experiences, thereby allowing expatriates to identify with and learn from one another. Will improve adjustment
	Acknowledge importance of role in Stakeholder Management	Share information relevant to manage home country stakeholders (reports, monitoring, newsworthy items)	Will help MNC head-office to understand and appreciate expatriate realities, thus enabling improved support.
		Get involved in on-site Coaching programmes to support new expatriates	Use peer directed learning to assist other expatriates; will improve adjustment
	Contribute to growing a body of knowledge around SA expatriates base in Africa	Participate in surveys and other diagnostics; be open and transparent about leadership challenges and needs	Will enable a comprehensive understanding of leadership challenges thus enabling MNC's to best lend the necessary and relevant support
		In partnership with SANE (AFRICA) develop comprehensive macro and micro checklists (The Finer Details: practical little things to pack that expats may over-look e.g. batteries and The Big Stuff - major things to do in preparation an expatriate assignment e.g. accommodation and educational facilities)	As expatriates contribute to this interactive blog, so too will others benefit in their preparations for assignment
		In partnership with SANE (AFRICAS) share best practices on specific experiences	Collective benefits will be realised by expatriates, learning from best practices

In keeping with the principles of African leadership theory and practice, the “*Who-What-How-WOW!*” model prioritises partnerships and collaboration. It provides pragmatic and well-defined recommendations and has been designed to enable different stakeholders to better understand their roles and take the necessary accountability and ownership for addressing the leadership challenges of South African expatriates working in Africa. It will also enable critical stakeholders to appreciate how their involvement and contribution can create and realise benefits on different levels such as improved subsidiary performance, improved domestic relations, enhanced team effectiveness, improved global talent management and better return-on-investment (ROI) as a result of reduced expat failure.

6.4 Suggestions for further research

This research has revealed a distinct lack of current research and information to help address the leadership challenges faced by South African expatriates as they adjust to life, professionally and personally, in other countries in Africa. More research is thus required in this field; each of the ten (10) core themes that emerged over the course of this body of research may be investigated in greater depth in further research.

Moreover, with the triple oppression that South African women have experienced as a consequence of historical political and cultural legacies, it is suggested that further research be undertaken that will focus specifically on the leadership challenges and needs facing South African women expatriates working in Africa.

To better understand the impact that spouses and families of South African expatriates have on overall expatriate success (or failure), more research will also be required into this, with a focus on coping and supportive strategies. While there is much research into the impact of spouses and families (in general) on expatriate success, there remains little research into those experiences of South African families having to manage through (and thrive in) the expatriate experience.

Furthermore, all the research into leadership challenges faced by South African expatriates will not holistically address the situation, without also greater research focusing on corporate head-office staff to better understand why and where the gaps lie such that they may be able to best support expatriates working on the African continent.

Finally, other researchers may wish to extend this study by exploring the impact of the Who-What-How-WOW! model (proposed as part of the recommendations of this study), in accordance with the theory development model of Carlile and Christensen (2004) discussed in Chapter 3.

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APPENDIX A: LETTER TO RESPONDENTS



Dear Sir/ Madam

My name is Natasha John; I am a student at WBS (Wits Business School), completing my MBA (Masters in Business Administration) and am currently working on my research report (which is a critical component of the degree).

My area of research is around the leadership challenges facing South African expatriates working in Africa. As part of my data collection, I need to interview South African expatriates who have worked in other African countries for a minimum of three months.

I would appreciate being able to interview you for 20-30 minutes on your personal experiences as a South African expatriate working in Africa. The interview will be tape recorded for the purposes of data collection efficiency and accuracy.

I acknowledge and understand that your schedule is extremely busy, and will be grateful if you could avail yourself for this interview. To make the process easier, I am happy to meet you at a location of your convenience.

I wish to assure you that your information will be kept confidential and treated with respect and anonymity.

Thank you for your support in helping me progress this area of research.

Best Regards!

Natasha John (natasha.john@eskom.co.za; 083 415 3777)

APPENDIX B: ACTUAL RESEARCH INSTRUMENT

Research questions for semi-structured 20-30 minute interviews	
Demographic questions	What is your gender?
	What is your age?
	How many years have you spent on expatriate assignment in Africa
	What is your race?
	What type of industry do you professionally belong to?
	How many African countries have you lived on while on expatriate assignment?
	What was your leadership designation while on your last (or current) expatriate assignment?
Question 1	What were the main leadership challenges that you experienced while on expatriate assignment in the continent of Africa?
Question 2	Of all the leadership challenges that you have experienced, what do you feel has been your biggest leadership challenge?
Question 3	If you had the power and authority to make changes to improve the experiences of South African expatriates working on the African continent, what would this be and why?

APPENDIX C: CONSISTENCY MATRIX

Research problem: Investigate the leadership challenges facing South African expatriates working in Africa and provide recommendations to support and enhance the South African expatriate experience when working on the African continent					
Sub-problem	Literature Review	Research question	Source of data	Type of data	Analysis
Investigate the leadership challenges facing South African expatriates working in Africa and provide recommendations to support and enhance the South African expatriate experience when working on the African continent	Avery (2007) Blanchard, Zigarmi, & Zigami (1985), Cummings & Worley (2009) Darley & Blankson (2008) Gupta & Dasari (2012) Heifetz, Ginnett, & Linsky (2009) Hill (2011) Keller (2007) Khoza (2011) Okpara & Kabongo (2011) Pires, et al. (2006) Smit (2010) Grinstein & Wathieu (2012) Gupta, Banerjee & Gaur (2012) Mahajan & De Silva (2012) Avril & Magnini (2007) Games (2010) Newenham-Kahindi (2009)	What are the leadership challenges facing South African expatriates working in Africa?	Semi-structured in-depth interviews with respondents	Textual data using qualitative data methodology	Content Analysis Thematic Analysis

APPENDIX D: MAP AND FACTS ABOUT AFRICA



Number of Countries in Africa - 54 and a couple of disputed territories (Western Sahara and Somaliland). South Sudan is Africa's newest country, officially born on July 9, 2011.

Number of Ethnic Groups (tribes) in Africa - Difficult to estimate but there are at least 3,000 distinct ethnic groups in Africa. A large country like Nigeria has more than 370 recognized tribes.

Number of Languages Spoken in Africa - There are over 2000 languages spoken in Africa. Arabic (in various dialects) has the highest number of speakers (over 170 million), mostly living in North Africa and the Horn of Africa

Most populated country in Africa - Nigeria is the most populated country in Africa with an estimated population of 125 - 145 million people. (Population statistics are politically loaded and that's why these numbers vary so much). Egypt is second with over 76 million people.

Most populated city in Africa - Cairo in Egypt is Africa's most populated city with an estimated 17 million residents living in the metropolitan area.

Tallest mountain - Mount Kilimanjaro, Tanzania: 19,340 feet / 5895 meters.

Largest desert in Africa is - The Sahara Desert which spans almost 3.5 million square miles (9,000,000 square kilometers). It stretches across North Africa and makes up a large part of a dozen countries.

Longest river in Africa - The Nile which is also the longest river in the world. It runs from Uganda all the way to Egypt for 4,132 miles (6650 km).

Largest lake in Africa - Lake Victoria in East Africa, bordering Uganda, Kenya and Tanzania. The Lake is the second largest in the world, at 26,560 square miles (68,800 square kilometres). It is the main source of the Nile River.

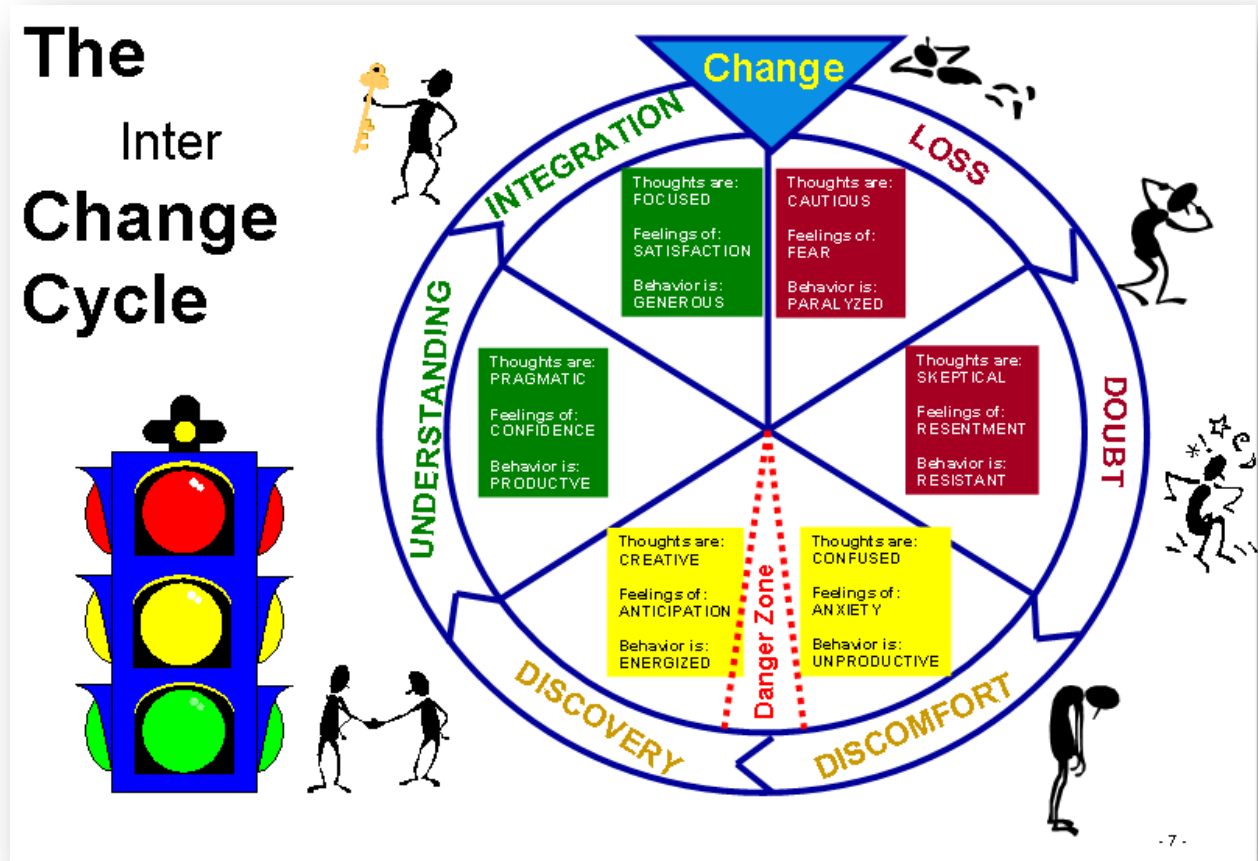
Largest island in Africa - Madagascar off the East coast of Africa in the Indian Ocean is the largest island in Africa and the 4th largest island in the world. Madagascar is just over 1000 miles (1580 km) long and 350 miles (570 km) wide.

Largest waterfall in Africa - The Victoria Falls on the border of Zambia and Zimbabwe. The Victoria Falls are just over 1 mile wide (1.7 km) and 355 feet (108 m) high. During the wet season over 500 million liters (19 million cubic feet) of water plummets over the edge into the Zambezi River. The spray can be seen from over 30 miles away.

APPENDIX E: BLACK MAMBA ON CAMP SITE AT MINE IN TANZANIA



APPENDIX F: THE INTERCHANGE CYCLE OF PERSONAL TRANSFORMATION (BROCK & SALERNO, 1994)



APPENDIX G: EXPAT EXPERIENCE LEAGUE (HSBC EXPAT EXPLORER REPORT, 2012)

Expatriate Experience League Table

About Expat Experience

Expatriate Experience looks at an expat's lifestyle, especially the ease with which expats can set up in their new country, how well they integrate into the local community, and their overall quality of life.

Countries	Overall Experience		Overall Setting Up		Overall Integration		Overall Quality of Life	
	Score	Rank	Score	Rank	Score	Rank	Score	Rank
Cayman Islands	0.64	1	0.8	1	0.67	7	0.59	1
Thailand	0.58	2	0.62	11	0.66	10	0.56	2
Spain	0.58	3	0.64	8	0.79	1	0.52	3
Singapore	0.56	4	0.72	2	0.61	18	0.51	4
Malaysia	0.54	5	0.68	4	0.65	11	0.48	7
Mexico	0.53	6	0.52	19	0.77	2	0.48	5
Switzerland	0.52	7	0.56	17	0.64	15	0.48	6
Germany	0.52	8	0.58	15	0.7	6	0.45	10
South Africa	0.51	9	0.66	7	0.53	25	0.47	8
Australia	0.5	10	0.7	3	0.7	5	0.4	17
Bahrain	0.5	11	0.64	9	0.63	16	0.43	12
Hong Kong	0.5	12	0.62	10	0.58	21	0.45	11
France	0.49	13	0.56	16	0.71	4	0.42	14
Canada	0.48	14	0.66	5	0.66	9	0.4	19
Bermuda	0.48	15	0.58	14	0.47	29	0.46	9
New Zealand	0.47	16	0.66	6	0.56	22	0.4	18
Belgium	0.47	17	0.51	20	0.64	13	0.42	15
United Kingdom	0.47	18	0.61	12	0.71	3	0.37	25
Netherlands	0.46	19	0.47	26	0.59	20	0.43	13
USA	0.46	20	0.6	13	0.65	12	0.37	23
Italy	0.45	21	0.51	21	0.67	8	0.38	21
China	0.45	22	0.54	18	0.63	17	0.38	22
United Arab Emirates	0.45	23	0.5	22	0.52	26	0.41	16
Qatar	0.42	24	0.5	23	0.49	28	0.38	20
Oman	0.41	25	0.45	27	0.54	23	0.37	24
Japan	0.41	26	0.44	28	0.64	14	0.35	28
Vietnam	0.41	27	0.42	29	0.59	19	0.36	26
Kuwait	0.4	28	0.47	25	0.51	27	0.36	27
Saudi Arabia	0.4	29	0.49	24	0.53	24	0.34	29
India	0.34	30	0.3	30	0.43	30	0.33	30

APPENDIX H: CORRUPTION INDICATORS: THE WORLD BANK ENTERISES SURVEYS (2011)

Economy	% of firms expected to give gifts to public officials "to get things done"	% o of firms expected to give gifts in meetings with tax officials	% of firms expected to give gifts to secure government contract	Value of gift expected to secure a government contract (% of contract value)	% of firms expected to give gifts to get an operating license	% of firms expected to give gifts to get an import license	% of firms expected to give gifts to get a construction permit	% of firms expected to give gifts to get an electrical connection	% of firms expected to give gifts to get a water connection	% of public transactions where a gift or informal payment was requested	% of firms experiencing at least one bribe payment request	% of firms identifying corruption as a major constraint	% of firms identifying the courts system as a major constraint
Sub-Saharan Africa	34.9	18.2	33.8	3.2	19.8	16.1	26.3	21.3	21.4	18.4	23.2	37.2	14.5
Angola (2010)	48.9	34.2	58.5	9.8	39	55.6	48.1	53.8	50	42.9	51.3	75.6	23.6
Benin (2009)	54.5	26.8	59	5	44.6	24.4	47.3	48.8	48.3	31.6	38.5	67.8	36.1
Botswana (2010)	7.3	8.4	1	0.1	2.9	5	1.5	3.7	13.3	5	8.4	27.4	6.4
Burkina Faso (2009)	8.5	6.7	11.8	0.9	4.1	17.8	14.7	16.1	5.8	7.3	9.8	70.5	25.7
Burundi (2006)	56.5	22.6	44.4	4.4	40.3	20.9	44.5	16.1	...	19.7	25.3	19.7	7.1
Cameroon (2009)	51.2	30.8	58.8	6	39.6	26.2	26.3	22.3	31.6	28.3	33.9	61.3	31
Cape Verde (2009)	6	1.1	0	0	0	2.3	3.6	1.3	0	1.3	2	29.8	17.6
Central African Republic (2011)	41.8	16.8	40.8	4.3	5.8	6.3	8.8	20.2	9.2	14.6	21	41.4	8.9
Chad (2009)	41.8	21.2	47.3	4.3	52.6	28.1	58.6	48.7	70.9	27.6	35	67.2	36.2
Congo, Dem. Rep. (2010)	65.7	54.4	75.7	9.3	53.8	7.8	50.7	38.3	46.1	52.9	57.2	72.7	33
Congo, Rep. (2009)	81.8	37.1	49.9	3.7	n.a.	21.1	11.9	19.9	17.1	30.9	37.5	65	37
Côte d'Ivoire (2009)	38.5	13.6	28.5	3.2	31.8	28.5	11.7	16.1	3	16.1	19.3	75	28.4
Eritrea (2009)	0	0	0	0	0	0	0	n.a.	n.a.	0	0	0	0
Ethiopia (2011)	4	3.8	2.7	0.2	13.5	0.7	7.7	5.3	9.2	4.3	6.5	7.1	2.8
Gabon (2009)	41.8	22.8	26.6	1.4	0	0	20	19.6	10	21	23.2	41.4	14.6
Gambia, The (2006)	52.4	13.6	50.3	4.3	23.4	29	28.3	31.2	n.a.	19.2	25.1	9.8	4.6
Ghana (2007)	38.8	18.1	61.2	8.3	22.6	38.8	47.6	32.3	31.8	19.7	23	9.9	1.7
Guinea (2006)	84.8	57.3	74.6	7.9	51.9	34.3	65.5	56.6	38.6	55.4	60.7	47.7	2.1
Guinea-Bissau (2006)	63.1	22.7	43.4	2.8	15.3	16.7	35.6	8.4	8	19.2	27.6	44	25.2
Kenya (2007)	79.2	32.3	71	7.8	28.8	18.6	35.6	22.4	33.8	27.2	42	38.4	13
Lesotho (2009)	28.1	9.2	16.7	0.6	3.3	1.7	26	11.4	15.7	9.4	14.6	46.7	25.2
Liberia (2009)	55.4	54.4	51.6	3.5	49.6	46	62.9	51.9	54.6	55.3	70.5	31.2	18.3
Madagascar (2009)	21.8	6.8	8.9	0.2	18.6	4.8	9.5	20.9	13.7	9	11.6	42.7	20
Malawi (2009)	10.8	11.4	2.8	0.1	3.5	0	4.9	12.6	n.a.	8.4	13.7	12.8	4.1
Mali (2010)	19.4	20.2	22.8	2.5	42.4	35.2	39.9	39.5	40.2	23.4	27.3	24.8	15.9
Mauritania (2006)	82.1	48.2	76.2	8.1	33.2	32.8	53	39.9	76.4	46.6	52.9	17.1	10.8
Mauritius (2009)	5.9	0.3	8.8	0.2	0	0.9	15.9	0.6	0	2.9	3.9	50.7	12.7
Mozambique (2007)	14.8	9.8	31.6	2.4	6.9	10.6	3.9	14.6	16.2	9.7	12.3	25.4	5.4
Namibia (2006)	11.4	2.6	8.1	0.5	0	0	0	0	0	1.1	1.2	19.1	6.1
Niger (2009)	35.2	13.7	43.4	3.9	32.5	3.7	46.6	21.9	22.6	13.7	18.5	83.7	14.2
Nigeria (2007)	40.9	22.9	44.3	4.7	40.3	33.3	53	39.3	32.8	30.1	40	24.7	...
Rwanda (2011)	6.3	4.4	6.8	0.3	0	2.5	13.9	0	9.2	4.1	6.8	15	9.8
Senegal (2007)	18.1	18.7	36.3	3	21.1	8.6	13.8	3.5	3.6	17.2	21.4	23.8	3.8
Sierra Leone (2009)	20.4	8.6	33.9	3.8	8.7	2.8	42.8	7	2.2	11.6	18.1	36.9	15.5
South Africa (2007)	15.1	3.1	32.2	1.7	0	2.7	0	6.7	4	3	4.2	16.9	1.6
Swaziland (2006)	40.6	3.3	31.9	1.1	7.3	17.6	13.7	8.4	n.a.	4.5	5.7	24.9	7.8
Tanzania (2006)	49.5	14.7	42.2	2.9	20.1	6.6	32.1	18.6	9.3	17	21.7	19.7	6
Togo (2009)	16.7	16.4	5.5	0.3	15.7	25.7	11.6	37.8	2.9	15.6	19.1	70.2	33.5
Uganda (2006)	51.7	14.5	45.5	5.6	12.9	23.9	11.7	19.2	5.5	14.2	18.6	23.6	4.2
Zambia (2007)	14.3	4.9	27.4	2.1	2.6	6.4	11.1	6.4	10.7	4.9	7.1	12.1	2.3
Zimbabwe (2011)	7.2	12.6	3.7	0.1	5.3	10.4	44	12.4	26.2	9.4	16.2	32.6	7

APPENDIX I: INFRASTRUCTURE INDICATORS THE WORLD BANK ENTERISES SURVEYS (2011)

Economy	Number of electrical outages in a typical month	Average duration of a typical electrical outage (hours)	Average losses due to electrical outages (% of annual sales)	% of firms owning or sharing a generator	Average proportion of electricity from a generator (%)	Days to obtain an electrical connection (upon application)	% of firms identifying electricity as a major constraint	Number of water insufficiencies (shortages) in a typical month	% of firms identifying transportation as a major constraint
Sub-Saharan Africa	8.9	6.8	7	44.3	26.8	33	49.2	2.4	26.9
Angola (2010)	4.7	13.5	12.6	79	33	7.7	35.7	2.5	25.3
Benin (2009)	8	2.6	7.5	50.5	26.1	86.8	51.9	1.1	46.7
Botswana (2010)	4.1	2.7	3.7	34.5	6.5	39.2	34.8	0.3	20.1
Burkina Faso (2009)	9.8	3.3	5.8	28.3	10.4	23.1	53.9	0.3	40.3
Burundi (2006)	10.7	10.2	10.7	41.9	25.4	24.1	72.3	1.8	21.1
Cameroon (2009)	9.8	3	4.9	34.8	15.1	17.6	58.6	0.9	27.7
Cape Verde (2009)	3.3	9.2	5.5	48.8	24.4	30.5	53.1	2.4	24
Central African Republic	29	8.1	25.1	81.5	37.5	11.8	76.1	5.4	33.4
Chad (2009)	19.6	8.8	3.3	75.5	69.7	10.6	74.6	0.7	45.5
Congo, Dem. Rep. (2010)	20	7.3	22.7	49.3	23.5	48	51.6	3	38.8
Congo, Rep. (2009)	21.5	34.3	16.4	81.8	56.3	8.4	71.1	12.6	48.4
Côte d'Ivoire (2009)	2	4.5	5	6.5	17	20.9	39.8	0.4	38.2
Eritrea (2009)	0.5	2.8	0.2	36.8	3.4	n.a.	0.2	0.7	2.2
Ethiopia (2011)	5.6	8.8	4.3	40.6	40.2	111.8	23.1	2.8	10.2
Gabon (2009)	4.6	5.4	1.7	22.9	9.7	34.5	58	1.2	48.8
Gambia, The (2006)	21	6.9	11.8	63.9	32.3	63.9	78.1	2.6	11.1
Ghana (2007)	9.5	12.6	5.6	26.6	29.5	24.4	86.2	5.7	17.6
Guinea (2006)	31.5	6.8	13.9	59.9	59.2	16.1	83.6	9.9	51.5
Guinea-Bissau (2006)	5.2	17.9	5.3	68.4	78.3	20.5	74.1	1.2	24.8
Kenya (2007)	5.8	4.5	6.3	65.7	14.7	40.5	27.6	3.1	30.6
Lesotho (2009)	4.1	5.5	6.7	30.9	...	13.9	44.3	2.5	19.8
Liberia (2009)	1.7	4.7	2.9	66.5	97.1	n.a.	59.1	2.3	39.3
Madagascar (2009)	11.4	2.3	7.7	29.3	18.6	92.1	54.6	0.5	26.6
Malawi (2009)	0.8	3.6	13.3	25.3	6.5	59.2	37.6	0.5	24.6
Mali (2010)	2.7	5.8	4.1	20.1	15.1	32.9	33.5	0.8	21.4
Mauritania (2006)	3.3	2.9	1.6	28.6	9.2	7.5	28.9	3.2	16.2
Mauritius (2009)	1.2	3.2	2.2	24.5	3.4	18.6	42.9	1.7	45.8
Mozambique (2007)	1.6	4.3	2.4	12.6	10.8	12.7	24.8	0.4	23
Namibia (2006)	0.4	2.7	0.7	12.8	6.1	9.2	6.5	0.1	7.9
Niger (2009)	18.5	1.6	1.9	34.5	20.1	37.1	63.2	0.2	50
Nigeria (2007)	25.2	8.2	8.9	85.7	60.9	7.5	75.9	9.6	28.1
Rwanda (2011)	4	4.4	2.7	49.4	7.4	38.9	15.4	0.9	28
Senegal (2007)	11.5	6.2	5	55.4	24.7	9.4	57.7	1.4	27.4
Sierra Leone (2009)	13.7	10.2	6.6	81.8	44.8	14.8	53.4	4.3	29.9
South Africa (2007)	0.9	4.5	1.6	18.4	10.9	15.8	20.8	0.1	3.9
Swaziland (2006)	1.8	2	2.5	36.8	10.2	16.9	12.4	0.5	14.2
Tanzania (2006)	9.1	7.9	9.6	45.7	36.8	44.3	88.4	6	14.1
Togo (2009)	7.3	5.7	10.5	63.6	17.3	53.9	50.9	0.4	32
Uganda (2006)	10.7	10.1	10.2	28.9	30.7	33	84.2	0.7	22.2
Zambia (2007)	2.5	2.9	3.6	13.7	19.5	97	11.9	1.9	10.6
Zimbabwe (2011)	6.7	5.9	8.8	53	10	30	46.8	2.5	10.1