Self-Initiated Expatriates in Context
Recognizing Space, Time, and Institutions

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12 Conclusions

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This book has knowledgeable authors contributing chapters that summarise and deepen our understanding of self-initiated expatriates (SIEs). They have, in particular, wanted to set SIEs in context: to focus on the influences of **space**, **time**, and **institutions** on the fascinating, important, and heterogeneous SIE population. In this final chapter, we go beyond what is known and begin the process of looking forward: to speculate about the current and future role of SIEs, to suggest what might be happening over the next few years, and to set out a research agenda.

SIEs in Context: Space, Time, and Institutions

In the 10 chapters (beside the introduction and conclusion chapters) written by different authors from different countries that explain SIEs in context, the authors have made suggestions for future research. In the following section we summarise these observations to suggest a wide and exciting future research agenda.

The first part of the book focuses on **space** as a context factor influencing the SIE experience. Here there are contributions from three different angles: the home country angle, the host country angle, and the cultural distance and language competence, angle.

In Chapter 2, Mila Lazarova and Ebru Ipek discuss the impact of the 'home country' in SIE research. Their key observation is that existing research has tended to focus on samples of individuals that come from the so-called WEIRD countries (Western, Educated, Industrialised, Rich, and Democratic) and represent only a "thin, and rather unusual, slice of humanity" (Henrich, Heine, & Norenzayan, 2010, p. 61). Such approaches naturally introduce concerns about the generalisability of our findings. Since research has focused on SIEs from the small number of democratic and prosperous OECD countries where the citizens enjoy a high standard of living and education, it has tended to cover individuals who are more likely to possess the prestigious qualifications and experience that are sought-after in a globalised business environment. They are also more likely to perceive themselves as externally employable in

new labour markets, giving them further motivation to look for work abroad as an SIE. In addition, there are many SIEs that may remain 'invisible' to SIE scholars and hence do not make an appearance in SIE research (Haak-Saheem & Brewster, 2017). The authors also point out that WEIRD countries may no longer be the countries that provide the largest outflow of talented professionals. They also raise the issue that the majority of SIE scholars are closely associated (through education and/ or academic affiliation) with WEIRD countries themselves. All this limits our understanding of SIEs in other types of contexts.

> **Proposal 1**. More research is needed on SIEs coming from outside the WEIRD countries, and we need insights from researchers representing these less understood country contexts in order to get a fuller picture of the SIE phenomena.

In Chapter 3, Marie-France Waxin and Chris Brewster turn our attention to the impact of the host country on SIE careers. They divide the host country characteristics into categories of institutional (wealth, quality of life, quality of education system for the SIE's children, labour market characteristics, employment regulation, and the SIE's employment/ skills utilisation level) and cultural characteristics (i.e. cultural distance between home and host country, language, personal fit with the host country, diversity climate in the host country, and preferred organisational culture and management style). Their main observation is that there is no research examining specifically the host country factors that could explain the SIE's career success or satisfaction, neither at the individual, nor at the macro or country levels. For example, the authors were not able to discover any research on the differential effect on future careers of international experience in different countries. In turn, it is suggested that host country reputation is an important factor that impacts the value of the SIE experience in the job markets.

> **Proposal 2**. More research is needed on the impacts of the host country characteristics and host country reputation on the career success of SIEs.

In Chapter 4, Maike Andresen and Birgit Muskat discuss how cultural distance (CD) between the home and the host country impacts expatriates' willingness to relocate abroad. For expatriates, relocation abroad means a change in culture—and depending on the CD, it also means different levels of challenge in adjusting to living and working in a new culture. However, they argue that CD needs to be conceptualised differently in expatriate research in order to better capture the SIE context. They suggest differentiating between SIEs' perceptions of and attitudes towards CD in relation to specific countries. Two SIEs that might perceive

a large CD between their country of origin and country of destination might nevertheless differ in their evaluation of this difference in that one SIE feels attracted to the large CD (which could be the case for some 'explorers'), whereas the other SIE is put off (which could be the case for some 'refugees'). As an outcome, in the same situation some SIEs can also be expected to be less interested in choosing more distant cultural contexts, and less willing to relocate internationally. To understand relationships better, individual differences such as the motives for expatriation, cultural intelligence, and prior international (work) experience will need to be considered. Moreover, SIEs are not only confronted with a new national culture upon relocation, but also a new organisational culture, because SIEs change employers when relocating. Moreover, working for local organisations, they might be confronted with the host country's career norms (Andresen, 2018). Thus, CD matters at multiple levels: national culture, organisational culture, and career norms.

> **Proposal 3.** Expatriate research needs to investigate causal links among cultural distance perception, attitude, and behaviour intention (such as the intention to relocate internationally). Moreover, SIE research needs to expand cultural distance beyond national culture, to also include cultural distances in terms of organisational culture and career norms.

In Chapter 5, Martyna Śliwa and Marjana Johansson discuss a rather new topic: how the language competence of SIEs impacts their foreign experience. Language competence is seen to be part of SIEs' career capital and a means towards the acquisition of further career capital during the assignment. Their analysis draws on the concept of stigmatisation as a vehicle for examining instances where SIEs experience being positioned as different. Stigmatisation occurs when a recognised difference is judged as socially undesirable or inferior and it may lead to exclusion and discrimination at the workplace. The authors focus on the impact of one aspect of SIEs' language competence, manifested in particular through foreign-accented speech. An accent is seen to serve as a cue for mobilising extra-linguistic evaluations of the speaker in relation, for example, to their intelligence, trustworthiness, and social status. Interviews among SIE academics demonstrate the importance of verbal language use for SIEs' experience and careers and shed light on potential aspects of disadvantage that are not directly related to language but that SIEs face due to being non-native language users. The SIEs expressed a view of accent as a marker of difference, which positions them as outsiders in relation to a perceived norm or a dominant social group, a condition of stigmatisation. Some participants also felt that a non-native accent presents challenges to effective communication and suspected that their accent might have a negative impact on how their overall performance is evaluated.

Proposal 4. We need further research on how language competence of SIEs impacts on their SIE experience.

In the second part of the book, the focus is on **time** as a context factor in SIE experience. The importance of time is analysed from three different angles: the long-term career impacts of expatriation, life and career stages, and adjustment over time.

In Chapter 6, Rodrigo Mello, Michael Dickmann, Chris Brewster, and Vesa Suutari discuss the long-term career impacts of expatriation and particularly among SIEs. The authors point out that, typically, career outcomes are studied at the repatriation stage or shortly after it—focused on the identified re-integration problems faced by the repatriates. The authors argue that findings differ on a longer timeframe and are generally much more positive. In particular, the authors explore the contextual nature of career outcomes among SIEs, discussing and analysing the long-term effects of international assignments on the future careers of SIEs in four empirical studies where SIEs are specifically identified. The analysis indicates that the findings are diverse. It is argued that the variety in findings is tightly connected to the time when the data were collected and the context from which the evidence is drawn. These diverse contexts are one of the main reasons for the contradictory evidence we have in the field of self-initiated expatriation. The most detailed survey shows that SIEs, looking back on their careers, believe that expatriation has been very positive.

Proposal 5. We need further research on expatriate career outcomes that takes into account the temporal dimension as well as the individual, organisational, and country contexts.

In Chapter 7, Wolfgang Mayrhofer, Katharina Pernkopf, and Lea Reiss analyse how the different life and career stages of SIEs impact their expatriation and repatriation experiences. In this chapter the authors utilise stage models of life, career, and family as well as the social chronology framework (SCF) to identify major elements and processes of the career transition of SIEs. Their review of existing research on various aspects of family in relation to self-initiated expatriation indicates that there is a scarcity of research-based evidence about the role of the family in self-initiated expatriation at different stages of the SIE's life. Family is seen to have a more important role among SIEs than among AEs, whereas organisations have less impact on their choices. Lack of organisational support and lack of clarity about job arrangements back at home challenge the repatriation process of SIEs. On the basis of these review observations, the authors suggest that future research should have stronger theoretical foundations and should take the whole family unit as the focus instead of focusing only on assignees. The importance of studying different types

of SIEs is also raised as important to understanding both universals and specifics among SIEs.

> **Proposal 6.** Future research should emphasise the temporal dimension and take into account varying life, career, and family stages of different types of SIEs.

In Chapter 8, Rita Fontinha and Chris Brewster discuss expatriate adjustment and note that whereas the adjustment process takes place over time, most of our research lacks recognition of time as an issue. There are few studies with a longitudinal design which would allow more certainty in advancing causal relationships. This means that overall few psychological process theories of expatriate adjustment have emerged, and the development of adjustment over time has largely been ignored. The phases, and timing, of adjustment varies with the different domains of adjustment. The authors also discuss how the adjustment processes of SIEs may differ from the adjustment process of AEs. For example, differences regarding the motives of SIEs and AEs to relocate abroad are likely to influence the adjustment processes of each group: organisational resources and support practices are often available to AEs, but less so to SIEs. Also, repatriation adjustment can be expected to differ because AEs have clearer plans about their repatriation, whereas SIEs tend to have less clear plans and often stay longer in the foreign country. Hence, SIEs may be more motivated to adjust than AEs. All in all, there are many future research possibilities in this area.

> **Proposal 7.** We need further longitudinal research on the adjustment of SIEs in order to identify adjustment patterns over time in the different domains.

In the third part of the book, the focus was on **institutions** as a context factor in SIEs' international mobility. The institutional context involved three different perspectives: expatriation in the SME sector, experiences of SIEs in different occupations and ranks, and the role of IHRM in supporting SIEs.

In Chapter 9, Marian Crowley-Henry, Edward O'Connor, and Blanca Suarez-Bilbao discuss expatriation within small and medium-sized enterprises (SMEs). It is suggested that the organisational context where SIEs work has not received enough attention (Wittek, 2019) and that there is a dearth of literature sharing the experiences of SIEs working in SMEs, as well as of SMEs employing SIEs. This lacuna in contemporary research undertakings and academic publications affects the HRM literature generally but does need to be addressed, because it is believed that the SME sector plays a significant role in employing internationally mobile workers such as SIEs.

> **Proposal 8.** Future research should examine the role of SMEs in contrast to large and multinational organisations in SIE employment.

In Chapter 10, Fabian Jintae Froese and Vesa Peltokorpi discuss the impacts of occupation and hierarchy on the cross-cultural adjustment and work attitudes (job satisfaction and turnover intentions) of SIEs, because these are seen to be key factors of successful expatriation in the literature. The authors state that very little is known about what individual characteristics predict SIE success and that one of the reasons for this relates to the heterogeneity of the SIE population. The authors suggest that higher-ranked SIEs have higher work adjustment than lower-ranked SIEs, whereas other aspects of adjustment were less clearly impacted. The authors emphasise the need for further research on career success as a concept and among different types of SIEs with different occupations and ranks and from different countries.

> **Proposal 9.** We need further research on the SIE experiences and management of SIEs in different occupations, hierarchical levels, and in different countries.

In the final part of the book, **outlook and conclusions,** the focus is on implications of self-initiated expatriation for organisations and their management of international human resources - an area that has been neglected so far in SIE research - as well as for research.

In Chapter 11, Liza Howe-Walsh and Susan Kirk discuss the role of international human resource management (IHRM) in the management of SIEs and point out that little attention has been paid to the opportunities there are for IHRM to play a significant role in supporting SIEs in their careers. The general view in the literature is that very few organisations actively engage in IHRM strategies and practices intended to attract and retain SIEs. In turn, there is far more evidence on how AEs are being managed compared to SIEs (Suutari, Brewster, & Dickmann, 2018). MNEs continue to struggle to attract global talent and thus companies are missing the opportunity to better utilise different types of recruitment pools, including different types of SIEs. There is a rich agenda for future research in order to better understand how MNEs and indeed other organisations can effectively manage SIEs and whether/how the needs of SIEs differ from AEs.

> **Proposal 10.** We need further research on the role of HRM specialists in recognising the value of SIEs and in managing them in ways that will allow them to make a full contribution to the organisation.

Summary

There is an extensive research agenda here open to scholars. Understanding context - and in particular the space, time, and institutional contexts — is crucial if we are to get a full understanding of the phenomena of SIEs. We broaden our discussion a little at this point and note that

we also need to understand the different types of SIEs that may be found in these contexts.

The Range of Different Kinds of SIEs

We have been aware since the early texts that there are different kinds of SIEs. Suutari and Brewster (2000) noted five different categories of SIEs:

1. *Young opportunists* are people at an early stage of their careers heading abroad for a prolonged period of travel, work, and tourism, much as described by Inkson, Arthur, Pringle, and Barry (1997). Unlike the New Zealand sample described by Inkson et al. (1997), many of them obtain important work at middle management or specialist levels.
2. *Job seekers* are individuals whose motivation is just to look for better career opportunities outside their home country.
3. *Officials* are typically older individuals working in the international organisations such as the European Union and the United Nations and thus differ clearly from other SIEs. They applied for their jobs from their home country and moved to Brussels, Geneva, New York, or wherever, once they had been appointed.
4. *Localised professionals* are a smaller group who had decided to stay abroad over a longer period of time, often following an AE experience. They perhaps preferred the local environment, the better career possibilities, or they had developed personal relationships with a local.
5. *International professionals* are the global specialists or 'mercenaries' with extensive experience of working in a range of international operations. They have since been dubbed 'global careerists' (Suutari, Tornikoski, & Mäkelä, 2012).

Since these early discussions there has also been examination of the much larger number of SIEs who do not get middle or senior ranking jobs (Haak-Saheem & Brewster, 2017). Our understanding of the sub-categories within the overall SIE group has become ever more fine-grained. There have been, as noted in chapters 2 and 3, studies of SIEs coming from and going to different countries. It has been noted (Andresen, Biemann, & Pattie, 2015) that SIE samples tend to include more women than AE samples but, in fact, there have been few studies of SIEs according to gender (for exceptions see Selmer & Lauring, 2011; Tharenou, 2010). There have been studies of homosexual SIEs (Kim & von Glinow, 2017; McPhail, McNulty, & Hutchings, 2016). There have also been analyses of different occupational groups. For reasons that escape us, academics have devoted considerable attention to academic SIEs (Froese, 2012; Davies, Kräh, & Froese, 2015;

Hassan & Hashim, 2011; Richardson & McKenna, 2002). There have also been detailed studies of nurses (Bozionelos, 2009) and the non-for-profit sector (Fee, 2017; Fee & McGrath-Champ, 2017). Few of these studies have singled out SIEs, although certain occupations, such as academics, tend to have a more global labour market, allowing SIEs more opportunities.

> **Proposal 11.** We need further research that compares the experiences of different categories of SIEs.

The Importance of SIEs: Current and Future Roles

SIEs in the World Economy

SIEs are a significant element of the international labour force. We have no idea of numbers, which are difficult to establish given the lack of construct clarity (see the section later on in the chapter) and the fungibility of the term. It seems likely that there are many more SIEs than there are AEs. Many SIEs, as we have noted, are employed by organisations, although there are only the beginnings of evidence that MNEs are taking advantage of this valuable group of potential employees. SIEs are, for MNEs, considerably cheaper than AEs: They are generally employed on local salaries and they have to pay from their salary for many of the things that AEs have paid for them by their employer (accommodation, family costs, travel, etc.). And they have some important advantages that AEs often lack. It seems that SIEs tend to be more international in orientation (Cerdin & Le Pargneux, 2010), to stay in a country longer, and to form close relationships with locals (Mäkelä & Suutari, 2013); they are often more fluent in local languages and understand the local culture better. In addition, they are known to the locals as someone who has not been sent by headquarters, someone who chose to come to the country on their own initiative. They tend therefore to be perceived more positively than AEs. And yet, they may also come from the home country of the MNE. Hence, they are in a prime position to act as boundary spanners (Furusawa & Brewster, 2018), translating the local culture, local issues, and local concerns to headquarters (or to local AEs) and headquarters' attitudes and requirements to locals.

Anticipated Future Growth

Whilst some have suggested that SIEs are replacing AEs, it seems that this is incorrect. There is limited evidence, so we are forced to rely on consultancy reports (e.g. Collings, Scullion, & Morley, 2007) but these indicate that the numbers of both AEs and SIEs continue to grow; crucially, however, the rate of growth of SIEs appears to be faster than that of AEs. It is generally

assumed in these consultancy reports that in the case of both AEs and SIEs, the discussion is about highly qualified expatriates. Including lesser-qualified expatriates simply emphasises the likely growth in numbers.

SIEs From Their Own Perspective

SIEs, then, are potentially important in the international workforce and the international economy - and are likely to grow in number. If we needed further justification to focus our research on this extensive group of international workers, this should provide it. Beyond that, however, our wish to understand the international workforce requires us to know more about the SIEs themselves. We need more studies and, in particular, more detailed studies of specific groups of SIEs: What motivates them? What is the process through which they end up in work in another country? How do they conceive of their careers? What issues do they find in achieving work satisfaction? What roles can they play in the host country? There are rich possibilities for future research.

Further Considerations for Future Research

Construct Clarity

To take advantage of these research opportunities we need to be clear about the focus of our research. It seems that there is a broad understanding that expatriates are people temporarily working (legally) in a country that is not their own (Andresen, Bergdolt, Margenfeld, & Dickmann, 2014; McNulty & Brewster, 2017). Most research on SIEs has adopted the restriction imposed on AEs that the category should be restricted to highly qualified workers (see Cerdin & Selmer, 2014). While it is understandable, given the costs of an expatriation assignment to employers, that organisations would only want to assign key staff to such expensive postings, there does not seem to be any logical reason why we should restrict our analysis of SIEs to the minority that are highly qualified (see Haak-Saheem & Brewster, 2017; Özçelik, Haak-Saheem, Brewster, & McNulty, 2019). The definition should be the same as for expatriates, except that in the case of SIEs the decision to transfer to another country is entirely down to the individual concerned (Andresen et al., 2014).

Fungibility

That does not, of course, mean that we are not aware that individuals can move from one category of international worker to another (McNulty & Brewster, 2019). We know that AEs can become SIEs (staying on after their employer wants them to return home), SIEs can be

assigned to yet another country by their employer, SIEs can become migrant entrepreneurs, and so on. Indeed, we could argue that there have not been enough studies of the process of transition (Ramboarison-Lalao, Brewster, & Boyer, 2019). On the other hand, arguably, for our research, the fact that people can move between the categories makes it even more imperative to be clear about which one they are in at any one point in time.

Global Career Perspective

The focus of expatriation research has traditionally been on a single assignment experience, whereas in reality increasing numbers of managers and professionals, in particular, have longer-term global careers involving various international jobs across different international locations (Andresen & Biemann, 2013; Suutari, 2003; Suutari et al., 2012). For example, studies indicate that 40–60% of European expatriates have earlier international assignment experience (Jokinen, Brewster, & Suutari, 2008; Stahl & Cerdin, 2004) and, among SIEs, the figure may even be higher than among AEs (Cerdin & Le Pargneux, 2010). SIEs thus tend to have longer international careers than AEs and to have a greater interest in considering more permanent global careers (Suutari & Brewster, 2000; Doherty, Dickmann, & Mills, 2011). How is the SIE experience different among such international experienced professionals than among individuals undertaking their first or their only international move? What kinds of global career experiences do SIEs have? What kinds of competencies do SIEs develop during their assignments (see e.g. Dickmann et al., 2018) and how transferable are such competencies to new assignments? There are many fruitful research avenues from the global career perspective.

Better Research

To date, the popularity of research into SIEs might be seen as the counter to the increasing difficulty of getting access to corporate databases: 'If we can't get companies to let us survey their expatriates, let's just send out an internet trawl and see what we get back'. The result has been a lot of research on SIEs where we cannot check response rates and we have no notion of the representativeness of the results. One consequence has been that little of this research is published in the top-ranked journals. The more we can change this, the better. We argue that SIE researchers need to consider the following:

- Targeting top journals (hence a need for more rigorous research)
- Conducting longitudinal research
- Exploring different types of SIEs

- Developing stronger theoretical explanations of their findings
- Taking more account of context.

Final Word

We believe that the information we have about SIEs has expanded considerably during the last two decades; the contributors to this book have brought us up to date with the state of knowledge as it stands, applying perhaps rather different lenses than is usual to that knowledge. We anticipate that the number of SIEs will continue to increase and that such an increase will be accompanied by a continual improvement in our knowledge about and understanding of the many different forms that self-initiated expatriation can take. We expect that the value of SIEs to their communities, their countries, and their employers will be increasingly recognised.

Fundamental to all of this is better research. We thank the readers of this book for their attention; and we encourage them to expand and improve their research and to help us add to our levels of understanding about SIEs. We wish you well in that endeavour.

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