

# Self-Initiated Expatriates in Context

Recognizing Space, Time,  
and Institutions

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## 1 Introduction

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# 1 Introduction

## Recognising Space, Time, and Institutions in Self-Initiated Expatriation Research

*Maike Andresen, Chris Brewster  
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### **The Need for Contextualising SIE Research: The Role of Space, Time, and Institutions**

This second edited volume builds on Andresen, Al Ariss, and Walther (2013), *Self-Initiated Expatriation: Individual, Organizational, and National Perspectives*, which served to give in-depth insights into the concept and the processes of self-initiated expatriation and presented different groups undertaking self-initiated foreign career moves. Thousands of articles on self-initiated expatriation have been published in the meanwhile that serve to help us gain a general understanding of the phenomenon. Looking at the samples underlying publications on self-initiated expatriates (SIEs) shows that the term ‘SIE’ has been employed to cover a large variety of distinct populations that differ in a number of key contextual factors such as their educational level, profession, country of origin, and destination country. We argue that such contextual factors mean that expatriates in and from different places, at different times and in different kinds of organisations, present different challenges for SIEs—such as the extent of required personal initiative by individuals (Andresen, Pattie, & Hippler, 2020). Furthermore, in much of this research samples were mixed, allowing us to draw only limited conclusions about the relevance and influence of contextual factors. This raises the question of how far existing research results are comparable. A look at the research questions and samples of SIEs in published SIE research shows that the role of context and its impact on SIEs’ career-related decisions and behaviours needs further exploration.

This second edited volume on SIEs deepens our understanding of SIEs’ careers by focusing on the contextual influences of space, time, and institutions on the heterogeneous SIE population. More specifically, this edited volume sheds light on spatial conditions in terms of home and host country impacts on the self-initiated expatriation experience (e.g. transferability of career capital between countries) and looks at developments over time in terms of temporality of conditions and changes of SIEs’ life-course

(e.g. adjustment and long-term career effects). Moreover, the authors analyse the influence of the institutional context in terms of occupational and organisational specificities on the heterogeneous SIE population.

Studies focusing on SIEs from a single home country living in a specific host country (space), being in similar life and career stages (time), or working in the same institutional contexts regarding their occupation or organisational environment, e.g. in terms of size and sector, are extremely rare (for an exception see Ramboarison-Lalao, Al Ariss, & Barth, 2012 studying Malagasy physicians in France). We often find mixed samples of SIEs in terms of space, time, and institutions, leading to considerable variance of relevant factors that influence the expatriation experience. For example, depending on ‘space’ the personal initiative and cultural intelligence needed to successfully relocate and adjust abroad are likely to differ, because the career norms, cultural values, and languages that SIEs need to master vary between countries. In terms of ‘time’, we lack studies focusing on long-term effects of different spatial and institutional conditions on SIEs’ adjustment, careers, and lives as well as longitudinal studies. And in terms of institutions, apart from the national-level institutional differences, many studies conflate SIEs in different sectors and organisations. There have been some studies of particular occupations: For some reason scholars seem fascinated by academic SIEs (e.g. Selmer & Luring, 2013), and there have also been studies of nurses (Bozionelos, 2009), professional service firms (Richardson & McKenna, 2014), and even religious leaders (Ramboarison-Lalao, Brewster, & Boyer, 2019). There have been almost no comparative studies of the differences between occupations or between organisations within a sector.

What is more, in many cases the description of sample characteristics does not allow for disaggregation by context. And those studies that do describe their samples in more detail in terms of space, time, and institutions usually do not discuss their results with respect to these contextual factors but, rather, attempt to generalise their results to all SIEs. We see a lack of discussion in most SIE studies in how far these contextual differences influence the results. Identifying relevant contexts and ensuring that they are adequately represented in our samples holds great promise, we believe, for understanding the phenomenon of self-initiated expatriation in a manner that will prove useful for both mobile individuals and organisations that might wish to employ them.

With this edited volume, we contribute on two particular fronts: First, our authors contribute to conceptual clarity in the burgeoning field of SIE research by drawing attention to the importance of exploring context and, thus, boundary conditions to careers. Second, they offer specific guidance for an improvement of future SIE-related research in order to enhance the validity of future empirical studies as well as for an improvement of managerial practice.

## Implications of Space, Time, and Institutions for SIEs' Careers

To represent different contexts in terms of space, time, and institutions we invited a specialist group of authors for this edited volume, drawing on authoritative researchers originating from a range of different institutions and from or currently working in five continents, i.e. Asia-Pacific (Japan, Korea, Australia), Africa (UAE), North America (Canada, USA), South America (Brazil), Europe (Austria, Bulgaria, Finland, Germany, Ireland, Poland, Portugal, Spain, Sweden, Turkey, United Kingdom), with experts at different career stages ranging from PhD candidates to professor emeritus.

This edited volume is divided into four parts focusing on space, time, and institutions as the three main context factors in SIEs' international mobility and followed by a concluding part that embeds the findings into International Human Resource Management (IHRM) (see Figure 1.1).

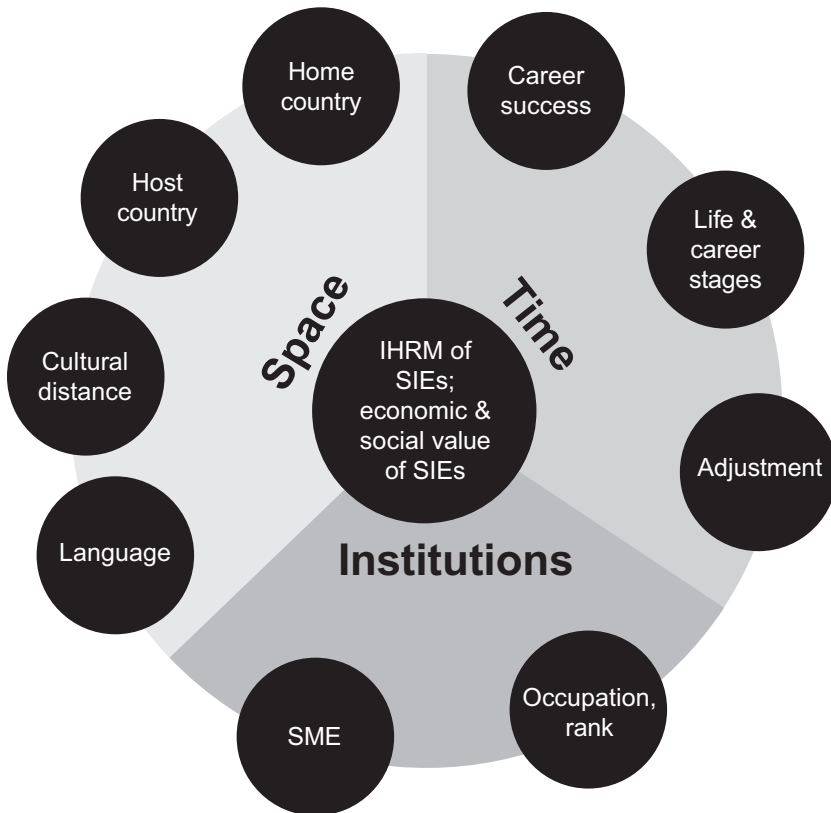


Figure 1.1 Book structure

*Part I—Space as a Context Factor Influencing the Self-Initiated Expatriate Experience*

The first of the four parts focuses on **space** in terms of effects of home countries, host countries, cultural distance between home and host countries, and languages as context factors influencing the SIE experience. Most SIE studies do not focus on a specific *home country*. Of those that concentrate on a single home country, most focus on Australia (e.g. Despotovic, Hutchings, & McPhail, 2015; Tharenou & Caulfield, 2010), Finland (Jokinen, Brewster, & Suutari, 2008; Suutari, Brewster, Mäkelä, Dickmann, & Tornikoski, 2018), Lebanon (e.g. Al Ariss & Syed, 2011), or New Zealand (e.g. Thorn, 2009). Strikingly, these are all countries where a larger percentage of people seek international exposure or live abroad. Thus, not much is known about individuals from countries where self-initiated expatriation is less common. Since SIE studies rarely consider and discuss the role of the home country, we lack insights into relevant home country-related factors that influence SIE mobility. However, individuals' backgrounds in terms of their home country are likely to influence their career decision-making, expectations towards international relocation, behaviours and (anticipated) personal as well as professional outcomes of their SIE experience.

In their Chapter 2, “Home Country” in Studies of Self-Initiated Expatriates’, Mila Lazarova and Ebru Ipek note that research has focused disproportionately on SIEs from prosperous, individualistic regions and countries. They examine two possible reasons for this relatively narrow focus and offer food for thought for future research. Based on a systematic literature review of 79 empirical papers on SIEs published in English-language peer review journals between 2000 and 2018, they find that SIE scholars have been selective in their approach to their subjects. There is a clear preference for a handful of home countries with shared characteristics: High status, economically prosperous countries that encourage talent mobility. Yet these are not the countries that provide the largest outflow of talented professionals. Lazarova and Ipek admonish the authors of such texts by pointing out that many others from less prosperous countries are also moving for professional and career reasons, and possess qualifications to work at any organisational level, but that researchers often choose not to label them as SIEs. They recommend that researchers should strive to diversify their samples, be mindful of who they study, how they categorise them and of the implications of these choices.

Looking at the *receiving country*, we once more note marked differences in how common foreigners are in the host society and hence to what degree self-expatriation to that country ‘goes beyond what is typically done’. A considerable portion of the published SIE literature focuses on host countries in the Persian Gulf with studies focusing on the United Arab Emirates (UAE) (e.g. Isakovic & Whitman, 2013; Stalker & Mavin, 2011) and Saudi Arabia (e.g. Alshahrani & Morley, 2015; Bozionelos,

2009). These are host societies in which foreigners are common (e.g. in 2018, the proportion of non-nationals in the total population was 90% in the UAE, 88.4% in Qatar, and 31.4% in Saudi Arabia; World Population Review, 2019) and that have a favourable legal framework for mobility. Other regions studied intensely include East Asia, with studies on China (Lauring & Selmer, 2014; Makkonen, 2016), Hong Kong (Selmer & Lauring, 2014), Japan (Peltokorpi & Froese, 2009), Korea (e.g. Despotovic et al., 2015), Macau (Lo, Wong, Yam, & Whitfield, 2012), Singapore (e.g. Supangco & Mayrhofer, 2014), and Vietnam (Ho, Jones, & Seet, 2016), as well as Western Europe, where studies on France are most prominent (e.g. Al Ariss, Koall, Özbilgin, & Suutari, 2012; Ramboarison-Lalao et al., 2012). Thus, moving to the UAE might not be so challenging for an SIE as expatriates account for most of the population there. The psychological distance can be considered fairly low. Moving as an SIE to Japan, Korea, or Poland, where the share of foreign-born people in total employment is small (OECD, 2018), could be considered an unusual step (Belot & Ederveen, 2012) and may create more problems. Furthermore, not much is known about the career norms prevailing in different countries that may imply more or less favourable conditions for SIEs' cross-border mobility.

In the conceptual Chapter 3, 'The Impact of Host Country Characteristics on Self-Initiated Expatriates' Career Success', Marie-France Waxin and Chris Brewster examine the host country's institutional and cultural characteristics that have an impact on SIEs' career success; and propose a research model and agenda. In view of the dearth of research on the impact of host country characteristics on SIEs' career success, they review the general literature on expatriate career success and identify key specific factors. They find that the major host country institutional characteristics that have an impact on SIEs' career success include compensation levels, quality of life, labour markets characteristics, employment regulations, and SIEs' skills utilisation level. The major host country cultural characteristics are cultural distance, language, diversity climate, and preferred organisational culture. They add the concept of the host country's reputation. Waxin and Brewster propose a research model for the impact of host country institutional and cultural characteristics on SIE career success and satisfaction, adding the host country reputation and using a few moderating variables.

A person's capability to manage cross-cultural interactions effectively has for a long time been conceptualised as likely to be dependent on the importance of differences between settings. Several studies conceptualise these differences between countries in terms of physical, cultural, institutional, and psychological distance (e.g. Demes & Geeraert, 2014; Gelfand et al., 2011; House, Hanges, Javidan, Dorfman, & Gupta, 2004; Kogut & Singh, 1988). Studies show that expatriation flows to geographical areas with similar or close language and culture are significantly larger (Belot & Ederveen, 2012; Wang, De Graaff, & Nijkamp, 2016).

However, existing conceptualisations of distance in expatriation research have their limitations.

The conceptual Chapter 4 deals with ‘Cultural Distance and Self-Initiated Expatriates’ Willingness to Relocate: A Research Agenda’. Maike Andresen and Birgit Muskat undertake a critical analysis of the appropriateness of existing conceptualisations and measures of cultural distance between home and host country as used in the International Business field for research in expatriation and of the dominant assumption in research that a high cultural distance is a barrier to SIEs’ willingness to relocate. Based on their critique the authors provide concrete advice for future expatriate researchers. First, they call for subjective cultural distance estimates related to specific countries/regions to predict SIEs’ relocation intentions and behaviours. Second, they advise distinguishing between SIEs’ perceptions of cultural distance (as an individual’s perception of cultural distance can be larger or smaller than the country average) and their individual attitudes towards cultural distance (a large cultural distance can be attractive for one SIE and daunting for the other, depending on an SIE’s motive to expatriate). An SIE’s cultural intelligence is likely to influence perceptions of and attitudes towards cultural distance. Third, they appeal for a more fine-grained analysis of cultural distance in the expatriate mobility context that is not limited to national culture, but also includes the organisational culture between the old and new employer and career norms in the old and new career field.

Some interesting work on the role of language as a context factor has begun, for example, examining the impact of the host country language on adjustment (Selmer & Lauring, 2015). Foreign language competence is part of SIEs’ career capital and is a means towards the acquisition of further career capital (e.g. access to further education).

The purpose of Chapter 5, ‘The Influence of Language on Self-Initiated Expatriate Experience’ by Martyna Śliwa and Marjana Johansson, is to address the impact of SIEs’ language competence, as manifested in foreign-accented speech, on SIE experience. The authors take as their example the experiences of differentiation associated with the accents of non-native English-speaking international academic staff in the UK. The analysis draws on the concept of stigmatisation as a vehicle for examining instances where SIEs experience being positioned as different. The empirical basis of the chapter is provided by 25 life history interviews with academics, at different levels of seniority, from 13 UK business schools. The findings 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 recommendations refer to the need for awareness raising and staff training with regard to the consequences of accented speech for SIEs, and in relation to developing

an understanding of communication as a responsibility of all employees involved in communication exchanges, regardless of their place of origin.

*Part II—Time as a Context Factor in Self-Initiated Expatriates’ International Career*

The second of the four parts of this edited volume focuses on **time** as a contextual factor in SIEs’ international career. Although career is often defined as a sequence of work experiences over time (Hall, 1987), the role of time in the evolution of careers is often only implicitly acknowledged in SIE research. The chapters in this section make further progress by explicitly aiming at the dynamic aspects of careers, including developments over time and the role of life and career stages by adopting a longitudinal life-course perspective.

On the individual level, job-related international mobility shapes life-courses and impacts SIEs’ careers abroad and upon return to the home country. While some SIEs repatriate to their home country, others relocate to another country or decide to localise and stay abroad. Depending on the career path that SIEs choose and when this individual career planning takes place—i.e. before, at the beginning, or during the international relocation—SIEs’ career behaviours abroad (such as proactive career activities, adjustment, investments in social networks) and career effects (such as subjective and objective career success) are likely to differ. Individual career behaviour abroad influences career development upon return. From an organisational perspective, the added value of SIEs’ international work experience might differ according to the career stage in which it was gained. For example, if SIEs leave their home country in their early career, they might lack social career capital (professional networks) in the home country (see Andresen, 2018).

‘The Long-Term Effects of Self-Initiated International Assignments on Future Careers of Assignees’ are at the centre of Chapter 6, authored by Rodrigo Mello, Michael Dickmann, Chris Brewster, and Vesa Suutari. Job-related international mobility shapes life-courses and impacts SIEs’ careers abroad and upon return to the home country—and thereafter. In this chapter, the authors examine the evidence for the effect of expatriate experience on their careers and explore some of the factors that impact that. Overall, they advance the argument that global mobility research, in general, and the assessment of (long-term) career success of self-initiated (and assigned) expatriates, in particular, would benefit from a more holistic approach. Individual, organisational, and country-level contexts are analysed, and it is concluded that these levels are interrelated, as effects on one will often have an impact on another level, which impacts expatriation attitudes, behaviours, emotions, and outcomes.

SIEs face specific needs and conditions in different life and career stages that are likely to impact the way that SIE careers develop and



unfold. Conflicts arise if the demands in different life and career stages cannot be harmonised. A central contextual factor during the life-course is the family.

Chapter 7, written by Wolfgang Mayrhofer, Katharina Pernkopf, and Lea Reiss, deals with 'Self-Initiated Expatriates at Different Life and Career Stages: The Meaning of Families and Their Impact on the Expatriation and Repatriation Experiences of Self-Initiated Expatriates'. The purpose of this chapter is to broaden our understanding of how families are affected by and themselves impact self-initiated expatriation processes. To grasp the domains involved and identify major elements of self-initiated expatriation, the existing empirical literature on the phenomenon is analysed through the lenses of stage models of life, career, family, and the social chronology framework. Findings show that there is little evidence about specifics of self-initiated expatriation at different times in SIEs' life and career when it comes to the role of family. However, the importance of family, family history, and relationship dynamics becomes explicit especially in decisions about and evaluation of different aspects of self-initiated ex- and re-patriation as the result of a multi-actor interaction. Emerging implications for the management of SIEs include supporting the harmonisation of life, family, and career domains, temporal sensitivity towards varying requirements in different stages of life, family, and career along with making use of the SIEs' home and host country networks for recruitment.

The ability to adjust is closely linked to the success of international relocations. Research models strongly suggest that expatriate adjustment processes include learning and exhibiting new behaviours in order to 'fit in' with the host culture and local career norms, thereby reducing acculturative stress. Although considerable research exists on the topic of expatriate adjustment and early departure, few psychological process theories of expatriate adjustment have emerged; and little research has focused on the development of adjustment over time (Hippler, Brewster, & Haslberger, 2015).

Chapter 8, 'Self-Initiated Expatriate Adjustment Over Time', discusses the role of time in expatriate adjustment, focusing specifically on SIEs, and contrasting them with assigned expatriates (AEs). Rita Fontinha and Chris Brewster develop a theoretical model depicting the different stages and timings of adjustment among both groups of expatriates. In their literature review of studies on both AE and SIE adjustment, they pay particular attention to the few longitudinal studies in the field. They provide an adjustment process model for SIEs vs. AEs where they address the factors that may facilitate the adjustment of both groups. The authors also describe factors that may be more relevant for the adjustment of one group specifically. Their main proposition is that the experience of AEs tends to have more defined time boundaries, compared to those of SIEs. They conclude that the adjustment process of SIEs may be more based on

individual action and dependent on wider factors and recommend that organisations employing SIEs are aware of this in order to understand this part of their workforce.

### *Part III—Institutions as a Context Factor in Self-Initiated Expatriates' International Mobility*

The third part of this edited volume sheds light on the role of **institutions** as a context factor that shapes SIE experiences. More specifically, the contributors look at the specifics of small and medium-sized enterprises and occupational conditions.

Whether employers value the international background of applicants (SIEs) depends, inter alia, on the organisational career norms and typical practices. Thus, the organisational context, i.e. whether the host organisation is local or foreign-owned and large vs. medium-sized or small, with its typical career norms is likely to have an impact on SIEs' career opportunities. While large organisations usually have large internal job markets and assign their employees abroad within the international organisation instead of hiring SIEs, SMEs are usually dependent on the external job market to buy in internationally experienced employees such as SIEs. Regarding ownership, arguably, SIEs' psychological distance is lower when contemplating entering a foreign-owned organisation, possibly simply because these have more diverse workforces and joining them is thus less of a step 'beyond what is typically done' than entering local organisations. Some interesting work on the effect of working for foreign-owned or local organisations on SIEs has begun (e.g. Selmer, Lauring, Normann, & Kubovcikova, 2015).

The corporate environment of SIE experiences is the focus of Chapter 9 with the title 'Understanding the Organisational Context: Self-Initiated Expatriate Experiences in SMEs', authored by Marian Crowley-Henry, Edward O'Connor, and Blanca Suarez-Bilbao. While there has been a proliferation of academic publications concerning SIEs over the past two decades (Andresen et al., 2013; Andresen et al., 2020; Cerdin & Selmer, 2014; Doherty, 2013; Lee, 2005; Przytuła, 2017; Suutari & Brewster, 2000), much of this has focused on the micro-level/individual unit of analysis, concerning their motivations (Doherty, Dickmann, & Mills, 2011; Doherty, Richardson, & Thorn, 2013), differences to other international assignees (Andresen, Bergdolt, Margenfeld, & Dickmann, 2014; Andresen, Biemann, & Pattie, 2015), and careers (Al Ariss, 2010; O'Connor & Crowley-Henry, 2020), amongst other topics (see other chapters in this volume). However, the meso-level/organisational context concerning where SIEs work has been underexplored (Wittek, 2019). There are some studies regarding SIEs employed in multinational enterprises and other organisations, such as higher education institutes (Fernando & Cohen, 2016; Froese, 2012; McDonnell & Boyle, 2012),

but there is a dearth of literature sharing the experiences of SIEs working in small and medium-sized enterprises (SMEs), as well as of SMEs employing SIEs. This lacuna in contemporary research undertakings and academic publications matches the HRM literature generally but needs addressing, particularly since the SME sector is credited with playing a large role in enabling internationally mobile workers, such as SIEs, access to employment openings (Barrett & Burgess, 2008). It is more common for AEs to work for big international MNEs and more common for SIEs to work for other kinds of companies (Jokinen et al., 2008). This chapter shares the limited existing literature concerning SIEs in SMEs compared to other organisational forms. It highlights the gaps in research in this area and sets out a research agenda for scholars in this area.

The term ‘SIE’ has been employed in the existing literature to cover a large variety of distinct populations that differ in a number of key contextual factors such as their employment levels (e.g. managers, professionals; Biemann & Andresen, 2010) and occupation. Some studies have focused on specific occupations, such as academics (e.g. Davies, Froese, & Kraeh, 2015; Selmer & Lauring, 2014, 2015), volunteer development aid workers (e.g. Andresen & Gustschin, 2013), foreign language teachers (e.g. Froese, Peltokorpi, & Ko, 2012), medical doctors (e.g. Nolan & Morley, 2014; Ramboarison-Lalao et al., 2012), nurses (e.g. Bozionelos, 2009), or even religious SIEs (Ramboarison-Lalao et al., 2019). Studies with mixed samples add considerably to this variety, introducing, amongst others, lawyers (Forstenlechner, 2010), journalists (Napier & Taylor, 2002), and artists (Clark & Altman, 2016). Several studies remain silent with regard to the occupations or professions and employment levels encompassed in their samples. However, many of the studies that focus on a specific occupational group and employment level state no specific research intentions related to that occupation and employment level and do not discuss their results specifically in relation to these context factors. While in some occupations international mobility is positively encouraged by national governments and supranational institutions and facilitated by funding bodies (e.g. academics) or represents an element of the professional habitus (e.g. engineers), in other occupations it is much more unusual and difficult to relocate, such as lawyers (Andresen et al., 2020). In addition, in terms of employment levels, mostly higher levels are analysed, whereas not much is known about, for example, career implications for the unskilled.

Fabian Jintae Froese and Vesa Peltokorpi explore the ‘Success of Self-Initiated Expatriates: Different Occupations, Different Realities?’. Their Chapter 10 focuses on occupational and organisational-rank related differences in SIE success. The authors drew on the conservation of resources theory (Hobfoll, 1989) and the managerial discretion concept (Hambrick & Finkelstein, 1987) to propose that occupations and organisational (managerial) ranks facilitate SIE success in terms of

cross-cultural adjustment and work attitudes (i.e. job satisfaction and turnover intentions). They tested their hypotheses using two data sets (191 SIEs in Japan, and 456 SIE academics in China, Japan, Korea, and Singapore). The results show some consistent and some mixed results. Overall, findings suggest that organisational rank has a profound impact on cross-cultural adjustment and work attitudes. While higher-ranked SIEs in both samples had higher levels of work adjustment, other adjustment was not affected by rank. The findings also show mixed results for work attitudes. While higher-ranked SIEs in the Japan sample were better adjusted, there were no differences in the SIE academic sample. Work attitudes were more positive among highly ranked SIE academics, but there were no differences in the Japan sample in terms of organisational rank. The authors conclude that occupational differences did not matter much.

#### *Part IV—Outlook and Conclusions*

In this final part, we examine the management of SIEs and suggest a future research agenda in relation to self-initiated expatriates.

So far, the literature has focused primarily on the individual perspective of SIEs, on the one hand, or HRM for international assignments within an organisation, on the other hand. Little regard is paid to the opportunities HRM can play in supporting SIEs in their careers, e.g. in terms of adjustment to the new organisation and culture, family support, employment conditions, or international career management.

The purpose of Chapter 11, ‘Self-Initiated Expatriates and the Role of International Human Resource Management’ by Liza Howe-Walsh and Susan Kirk, is to consider the role of IHRM in supporting a globally mobile workforce. They consider the people strategies required to address the diverse range of SIEs’ needs and thus meet the rise in demand for global talent. They highlight how IHRM strategies designed to respond to the demands of such a contextually embedded mobile workforce can be developed and discuss the role of HRM professionals in developing appropriate policies and practices. The authors identify how support from IHRM during the various employment phases of an SIE can help to attract and retain valuable global talent.

In the final Chapter 12 the editors, Maike Andresen, Chris Brewster, and Vesa Suutari, draw ‘Conclusions’. We summarise the key learnings from each chapter in terms of the influence of space, time, and institutions on SIE careers. Moreover, the perspective is broadened by underlining the economic and social value that SIEs have for organisations and societies. Drawing on the various chapters outlined previously, and this outlook, a future research agenda is presented.

To conclude, this edited volume contributes to the research on the role of contextual differences between the various sub-groups of SIEs. We

thank the authors for sharing their expertise and we look forward to further research on the topic.

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