

Career Mobility in a Global Era – Advances in Managing Expatriation and Repatriation

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Abstract

The surge of interest in expatriation and repatriation within the broader discourse on labor mobility of professionals and high-skilled labor, human capital development and the theory and practice of people management, serves as the backdrop to this paper. We propose that expatriation and repatriation be framed in the context of global careers and embedded in the wider social-economic environment of globalization through the lens of a career ecosystem theory. We chart the evolution of scholarly publications on career mobility over the past four decades and highlight current trends, in particular the emergence of *self-initiated expatriation* as a pivotal change in the direction of expatriation studies and derived practice. We assess the rigor of empirical findings, weigh theoretical underpinnings, offer a research agenda for future research and outline managerial implications.

Keywords: Expatriation; repatriation; global mobility, globalization

Introduction

Since WW2 and in particular this past generation, we have evidenced an exponential growth in the globalization (and regionalization) of firms and markets, aided by the ease and speed of

low-cost communications and related technological developments; as well as the facilitation in the movement of goods, capital and people via regional economic integration, such as the European Union (EU), North American Trade Agreement (NAFTA), ASEAN (Association of South-East Asian Nations), China's Silk Road Economic Belt and the Russian-led Federation of Independent States. These developments are further accelerated by the ascendancy of emerging markets (Cuervo-Cazurra & Ramamurti, 2014; Luo & Tung, 2007; Ready, Hill, & Conger, 2008), thus contributing to a multi-directional flow of human capital across international borders. In short, cross-border international mobility has become critical to the sustainability and competitiveness of the global economic order, even for small provincial firms in developing economies (Anderson, Brahem & El Harbi, 2014).

A more recent contributing factor to the rise in labor mobility was the 2008-2009 global financial and economic crisis and its aftermath (Beets & Willekens, 2009). Young people from industrialized countries, such as the U.S. and Europe, have become increasingly willing to relocate elsewhere in search of job opportunities and career prospects (The Economist, 2014). Collectively, these developments have contributed to an estimated 232 million people who live and work outside their countries of origin worldwide (OECD, 2013).

In this paper, the emphasis is on high-skilled talent, commonly known as expatriates, both corporate-sponsored and self-initiated (SIE) and variants thereof, which has been the focus of scholarship in the field since its inception. While labor mobility encompasses the whole spectrum of competences and availabilities, including lower-level jobs, expatriates typically represent high-skilled talent. The current attention to the "war for talent", a term coined by McKinsey (Chambers, Foulon, Handfield-Jones, Hankin & Michaels, 1998), refers to the reality that in light of labor mobility and the rising educational/technical skills' levels of people from emerging markets, companies and indeed nations from around the world are competing for the same talent pool (McNulty, 2014). Indeed, as Farrell & Grant (2005) asserted, while China is the most populous country in the world, it experiences a shortage of high-skilled talent. This paradox is very much evident in the present economic climate

whereby those with low- or mediocre-level skills are laid off, while the demand for high-skilled talent remains very high.

At the core of the paper is a comparison between 'traditional' expatriation (company initiated, relocation package, pre-determined time scope) and concurrent variants. Arguably the most significant development in recent years is the emergence of Self-Initiated Expatriates (SIEs) (Dickmann & Harris, 2005; Doherty, 2013; Tharenou, 2010; Vaiman & Haslberger, 2013; Andersen, Al Ariss & Walther, 2013; Doherty, Richardson & Thorn, 2013) with important implications for theory as well as practice.

Context is critical in evaluating the extant scholarship and for setting a future research agenda. At the individual level, we witness a relentless drive for individualization and self-directed careers (Beck, 2002; Fulmer & Gibbs, 1999) that corresponds to an increase in the types and nuances of expatriate mobility (Baruch, Dickmann, Altman, & Bournois, 2013). At the firm level, we evidence a shift to global talent management (Cascio & Boudreau, 2015) as the search for prospective candidates does not recognize national borders, with a concomitant increase in the deployment of various assignments' configurations discussed later. At the national level, international assignments are no longer unidirectional (from Western developed economies to less developed economies) while taxation continues to pose a barrier to cross border deployment (Stegman, 2015).

Aims

In this paper we take a comprehensive, state-of-the-art systematic approach to the reviewed literature (Hodgkinson & Ford, 2014). We aim to encompass different perspectives and highlight the multi-disciplinary nature of the field to, one, deepen our understanding on the evolution of the discourse over time; two, critically evaluate what we know to-date (and what we do not know); and, three, explore the epistemological underpinnings of the extant literature. We offer a novel theoretical lens – an ecosystem theory

of careers – whereby new forms of institutional work arrangements emerge in response to changes in the environment. We conclude with a detailed research agenda and suggestions for managerial practice.

The E&R phenomenon

As a multi-level, multi-phased phenomenon involving numerous stakeholders, E&R presents a complexity that is not easily captured or portrayed.

Insert Figure 1 & 2 about here

Figure 1 presents an overarching aspirational framework for the study of the management of global mobility, E&R in particular. We attempt to portray a multitude of elements that E&R scholars recognize as worthy of investigation at different levels of analysis; and seek to capture the complexity and inter-connectivity among these various components. For example, with the growing trend toward SIEs, the entire expatriate set-up (recruitment, training, compensation & performance appraisal, as well as scholarly discourse and theorizing) needs to be re-examined (Altman & Baruch, 2012; MacDonald & Arthur, 2005). Throughout this paper we report, analyze and discuss the various elements presented in Figure 1, although the extant knowledge in the field does not account for all the important interactions, in particular across different levels of analysis. Figure 2 complements Figure 1 by outlining a typical chronology of E&R as well as providing a schematic view of E&R processes.

E&R in the global labor market as a career ecosystem

We propose to apply an ecosystem theory (Muller, 2000) to careers and labor markets. We consider the labor market, the global labor market included, as an ecosystem (Baruch, 2015) where a number of players act and interact with each other. In this ecosystem,

national systems, employers, and employees are the main actors. An ecosystem theory thus offers an overarching framework to construe and analyse expatriation, repatriation, and related global moves. Career theories are typically fragmented (Arthur, Hall & Lawrence, 1989; Lee, Felps & Baruch, 2014). For example, there is a disconnect between individual perspectives and organizational management, on the one hand, and between these and factors associated with career moves, either within-country or global moves, on the other. By adopting an ecosystem theory perspective, it enables us to deal with a number of players /actors at different levels of analysis where numerous factors influence mobility decisions (Baruch, 1995). Due to the dynamic nature of E&R, the multiplicity of actors involved and the multiple levels it encompasses, within an overall environment that can be characterized as VUCA (volatile - unpredictable - complex - ambiguous): the 'new normal' - an ecosystem theoretical frame is particularly relevant.

Iansiti & Levien (2004, p. 5) define an ecosystem as '*a system that contains a large number of loosely coupled (interconnected) actors who depend on each other to ensure the overall effectiveness of the system*'. Moore (1996, p. 9) defined business ecosystems as "an economic community supported by a foundation of interacting organizations and individuals – the organisms of the business world." Mitleton-Kelly (2003) added the caveats of interdependence among the entities within the system and the principle of co-evolution that does not happen in isolation. Following from Peltoniemi and Vuori (2004, p.13) who consider "a business ecosystem to be a dynamic structure which consists of an interconnected population of organizations" we extend this meso level analogy to include, at the micro level, human actors; and at the macro level, national context, in line with an open system approach (Katz & Kahn, 1978).

Viewing international mobility as an ecosystem provides us with a platform to depict the interdependencies and dynamics that now characterize international mobility. We

examine its constituents and explain how the system functions as an ecosystem analogous to a bio-ecosystem (Peltoniemi & Vuori, 2004) defined by Iansity and Levien (2004).

The *Actors* in the system are individuals, institutions and nations. Individuals act, interact and communicate. Institutions, most notably employing firms, offer employment, initiate global assignments and manage people as they progress in their assignment and upon repatriation. Governments offer incentives to desired talent (e.g. skills in short supply) and pose barriers (formal and informal) to undesired talent. The nature of expatriate assignments is such that *interconnectedness* is complex because, apart from the contractual bond between employer and employee, there is an additional complexity of the geographical and cultural contexts as well as the essentially temporary nature of the assignment. Thus Guzzo, Noonan, and Elron, (1994) note that expatriation-related psychological contracting is more challenging to create and maintain. *Interactions* are most notably the exchange of labor for wages, as well as the host of pertinent regulations and laws, such as employment and migration laws at the national level; and policies and strategies at the firm level. In the context of *Interdependency*, firms depend on employees to survive, perform and thrive; and on governments to enable them to conduct their business. Nations depend on the individuals' productivity and on organizations creating wealth. Individuals require opportunities (facilitated by governments and organizations) to become engaged fruitfully, exercise their talent and do well.

Overall effectiveness is in perpetual motion. People's interests and motivations change, organizations rise and fall, nations and regions' fortunes emerge and decline. Those who do not fit, those not willing to change or accommodate changes, are left out - be they individuals (Hall, 2004), organizations or nations (Sölvell, 2015).

To illustrate the dynamics of the system, imagine the push and pull forces driving talent flow across international borders. Building on Lewin's field theory (Lewin, 1951) whereby any decision to act, in this case, expatriate then repatriate, is subjected to driving versus restraining forces, the model has been further developed by Baruch (1995) and Bauer and

Zimmermann (1998) to emphasize the economic context of the flow of workers and relational aspects such as work-related aspirations, family implications, organizational needs, and cultural values.

What's in a name? The evolution of the expatriate concept

An expatriate has been traditionally defined as an employee sent on assignment by his/her company to another country, usually on a temporary basis, to fulfill specific organizational objectives (Dowling & Welch, 2004; Richardson & Mallon 2005). Common reasons why companies expatriate their personnel are control and coordination (Edstrde & Galbraith, 1977; Harzing, 2001), knowledge transfer (Beaverstock, 2004; Zaidman & Brock, 2009; Park & Mense-Petermann, 2014) and learning development (Belderbos & Heijltjes, 2005). Tungli and Peiperl (2009: 160) compared practices in German, Japanese, UK, and US MNCs. They found much uniformity in expatriate practices – such as start-up of a new operation, control of the foreign operation, career development opportunities for expatriates and local nationals; transfer technology and filling skills' gap. This apparent uniformity suggests a convergence in corporate expatriation.

While most studies of expatriation focus on business firms sending people abroad, other sectors should also be borne in mind. These include not-for-profit organizations (Mäkelä, Suutari, Brewster, Dickmann, & Tornikoski, 2015), the military (Fisher, Hutchings & Pinto, 2015), NGOs such as United Nations agencies and other aid organizations, peacekeeping missions (Van Emmerik & Euwema, 2009) and the diplomatic service (Hart, 2015) as well as missionaries.

Notwithstanding the above, the extant knowledge derived from traditional corporate-sponsored and firm-initiated expatriation scholarship may need to be re-evaluated due to the increasing significance of SIEs - people who relocate to another country for work purpose and life style reasons, at their own initiative; and the increasing array of expatriation configurations. Baruch and colleagues (2013) listed 20 contemporary variants including

flexpatriation, in/im-patriation, secondments and globetrotting, to name a few of those contained in the extant literature. To appreciate the accelerating complexities of the expatriation phenomenon consider the following examples. How would one classify ex-host country nationals: citizens of non-domestic origin who return to their country of origin (COO) and yet retain a presence at their country of immigration (COI)? (Tung & Lazarova, 2006; Tung, 2016). Or, cross-border commuters, such as the throng of 138,700 who “commute” daily for work to tiny Luxemburg (population 530,000) from neighboring France, Germany and Belgium? (Schinzel, 2015). Or the thousands of cross-border ‘shuttle’ traders crossing weekly from Belarus to adjacent Poland, Russia and Lithuania, dividing their time between two abodes? (Anderson et al., 2014; Welter et al., 2014). What is the dividing line between cross-border commuting and expatriation; what is one's status when residing in one country yet working and paying taxes in another?

Other complexities further confound the difference between expatriation and migration. Much of the so-called economic migration can be summed up as a move to another country for anticipated material gain. If this move is time limited, it may be termed self-initiated expatriation; if the move is permanent in nature, it would be called migration. Or would it? What are we to make of concurrent home/overseas living arrangements, as in the case of Chinese Americans and Indo-Americans in Silicon Valley, who establish dual business beachheads in both the COO and COI? (Saxenian, 2005; Tung, 2016). In fact, migration is no longer the finite mobility transition it used to be. Migrants do not normally cut themselves off from their relations, friends and networks back home; their COI citizenship allows for the possibility to repatriate with changing economic, political or personal circumstances (Clark & Altman, 2015). Within political-economic blocks such as the contemporary EU, or the historical Habsburg Empire, migration and expatriation are conflated terms. The right to live and work within the entire territory has enabled the ongoing movement of people who come to stay for a few years, then move on to another country, or go back to their COO. Today one may move freely between the Baltic Sea in the Northern

part of Europe to its most Western tip in the Atlantic Ocean without much ado, similar to the possibility up to WW1 to cross from the Black Sea to the Adriatic coast without crossing an international border.

Repatriation, commonly defined as the return of individuals from their expatriate assignment to their COO and home organization (Lazarova, 2015), has attracted less interest and attention in the literature, possibly because it was assumed that in returning to a familiar environment one may not encounter significant challenges (Tung, 1988). These assumptions may not hold in practice, however. Over the course of an expatriation assignment, many changes, some of them subtle, take place in the home country. Within the organization, people may have moved to new positions and there may be changes to organizational structures and processes. It is not uncommon for someone returning from an overseas assignment after several years of absence, to encounter unfamiliar faces occupying key positions, departments dismantled, or a new business strategy in place. Hence, the organization the expatriate returns to is not the same as the one he/she left going on assignment. At the same time, the repatriates may have changed too, ranging from having gained skills and acquired new knowledge, to developing new tastes and attitudes; and of course time in itself acts as a change agent (maturation).

As has been noted, expatriation involves both physical and psychological boundary crossings (Stahl, Miller, & Tung, 2002; Sullivan & Arthur, 2006). Consequently, repatriates often face a reverse culture shock (MacDonald & Arthur, 2005) that may account for the high incidence of those leaving their firm voluntarily or by mutual agreement (Baruch, Steele & Quantrill, 2002). At least part of the reasons for the high rates of failure in repatriation are the contradicting expectations between those being repatriated and their home organization. Employees expect to gain recognition and benefit materially and through promotion from their overseas experience (Baruch et al., 2002; Kulkarni, Lengnick-Hall, & Valk, 2010) while the reality they encounter upon return may frustrate these expectations (Paik, Segaud, & Malinowski, 2002).

The career success or failure of repatriates may impact on an organization's ability to retain them and others, since the way repatriates are dealt with, signals the value (or lack thereof) of expatriation as a career move (Bolino, 2007). Organizational training and career interventions can mitigate the impact of reverse culture shock (Ahad, Osman-Gani, & Hyder, 2008; Paik, Segaud, & Malinowski, 2002). Some may be sufficiently disillusioned to return to the host country to work for a different employer (Borg, 1988; Ho, Seet & Jones, 2015) or move to other countries, thus establishing a career pattern as 'perpetual' expatriates, as exemplified by the ecosystem theory.

Expatriation and repatriation research evolution over time

The movement of people across international boundaries for economic and non-economic reasons goes back in history some 10,000 years (Harari, 2014). The advent of the agricultural revolution that saw the establishment of permanent settlements with increasing specialization in the production of food and other commodities was followed by the development of trade and its specialized emissaries. These traders spent lengthy periods of time abroad - months, sometimes years; in fact, they were the first expatriates. These trade expeditions were widely expanded during the era of colonialism by European nations. For example, the East India Trading Company was established in 1600 for the specific purpose of developing trade between Britain and the East Indies, including China. The Dutch East India Trading Company was established in 1602 for a similar objective.

Until the 1970s, E&R did not garner much attention in the academic literature and received only passing reference in the practitioner literature. The first wave of scholarly research focusing on expatriation, later also repatriation, was marked by pioneering studies on selection, training and placement of expatriates for international assignment, beginning with Hays (1974), Tung (1981; 1982), Adler (1979, 1984) and Izraeli, Banai & Zeira (1980). By the late 1980s repatriation as an emerging area of interest (Tung, 1988) followed.

For the past two decades we note a marked change from the study of traditional expatriation whereby a company dispatches people to work overseas over a specified time period, then repatriates them back home upon completion of their assignment abroad. SIEs have become an important feature of the E&R scene (Howe-Walsh & Schyns, 2010) and, at the same time, there is a move in the corporate world to shorten the duration of expatriate assignments from the 2-3 years' norm popular among Western-based multinationals (5 years in the case of Japan) (Tung, 1984). Shorter variants appeared, including flexpatriation (an overseas posting not necessitating relocation) (Mayerhofer et al, 2004), globetrotting (Allard, 1996), as well as movement in a reverse direction, from the subsidiaries to the mother company (inpatriates) or other subsidiaries (Harvey, Speier & Novicevic, 1999).

Nowadays the numbers of those who relocate worldwide for work or career reasons on their own initiative are much higher than traditional corporate-sponsored expatriates (Al Ariss, 2010). Altman and Baruch (2012), Doherty, Dickmann, and Mills (2011), Doherty, Richardson, and Thorn (2013) have noted the emergence of self-initiated expatriation from within the organization, whereby employees create the opportunity and impetus for expatriation; also expressed in the extent to which increasingly executives from the US, European and Asian multinationals subscribe to an idea of a "boundaryless career" (Arthur & Rousseau, 1996; Tung, 1998; Stahl et al., 2002; Kim & Tung, 2013). "Boundaryless careerists" refer to people who value the learning and experience that they derive while living and working abroad even though their efforts may not necessarily be recognized by the organizations that sponsored them in the first place. To continue their pursuit of international learning and experience, they are willing to switch employers and/or make lateral career moves across organizations and countries.

This decade (the 2010s) sees E&R research steadily gaining momentum, its salience growing in the academic and professional literatures, with some 30,000 articles and related entries revealed by a current GoogleScholar search (2015). We note an expansion in the

disciplinary reach (migration studies, geography) and concurrently a focus on expatriation as a wider societal phenomenon.

Insert Table 1 about here

Reflecting on four decades of E&R research, we note the expansion (horizontal) of topics covered and the intensification of detail (vertical) in their treatment. This expansion and intensification are represented in Figure 3.

Insert Figure 3 about here

At the beginning (1950s - 1970s) matters were relatively simple and straightforward. Expatriates were typically senior male executives sent by large companies usually headquartered in the US (Buckley, 2015; Perlmutter, 1969) and, possibly Canada or Western Europe, to establish a presence in the wholly-owned subsidiaries of the respective multinationals. Most expatriates were married and hence accompanied by a female trailing spouse and perhaps dependent children (Adler, 1984). They would be assigned for a fixed term period and upon completion return to a guaranteed position in their home base, possibly with promotion. The company was large enough (in size, market share or turnover) to warrant this infrequent though necessary inconvenience and expense. The little research available tended to be descriptive, providing examples of extant practice with little discourse of alternatives (which were not readily available); and much of it focused on legal issues (Madden & Cohn, 1966; Vagts, 1970) or essential success skills (Benson, 1978).

With the growing internationalization of firms and the advent of globalization, matters became more complicated. By the 1990s mid-level executives have begun expatriate assignments too - some of them were women (though few and far between) and the trailing spouse was no longer content with her role as supporting wife (Riusala & Suutari, 2000).

Firms started to offer emotional or instrumental support for the spouse (Harvey & Wiese, 1998b), for example in finding employment (Harvey & Buckley, 1998; Moore, 2002). The motivations for expatriation were no longer to merely represent the company, impart know-how and exert control as before, but also to develop the global mindset of those with potentials for further advancement in the organization and to learn from the foreign operation. At the same time, the expansion in the number of expatriates and the accelerating costs of the expatriate package resulted in companies turning to other sources for staffing, such as Third Country Nationals (TCNs) who typically are cheaper than parent country nationals (Boyacigiller, 1990; Shaffer, Harrison, & Gilley, 1999); or to the deployment of inpatriates (host-country nationals from a foreign subsidiary to a position at the mother company or another subsidiary) to develop local talent and further communication among its subsidiaries (Harvey & Wiese, 1998a). We also encounter the beginning of the ongoing debate on the use of expatriates versus locals discussed later in the paper.

By now we are in the 2010s and globalization has quickened with markets and economies becoming more accessible than ever before (Anderson et al., 2014). Revolutions in communication technologies enable virtual connectivity, thereby enabling the creation of virtual global work that comprise of geographically distributed team members (Malhotra & Majchrzak, 2014). Equally, more reliable and cheaper air travel facilitates frequent flyer and international rotational assignments (Caligiuri & Tarique, 2006). At the same time, frequent international travel is a cause for stress and may accelerate resultant burnout and personal and family difficulties (Westman, Etzion, & Gattenio, 2008). Stress has been identified as one of the factors that influence a repatriate's ability to cope with readjustment upon return (Herman & Tetrick, 2009).

Senior and middle-management employees no longer have monopoly over expatriate posts and junior executives are sometimes sent on assignment overseas (for example, Siemens has followed this policy since the 2000s). The HR function is mindful of wider concerns (family, education, lifestyle) as dual-career couples are now the norm rather the

exception (Hammer, Allen, & Grigsby, 1997; Harvey, 1997; Silberstein, 2014).

Furthermore SIEs have become an attractive recruitment source for companies (Collings, Scullion, & Dowling, 2009). In addition, multinationals are increasingly aware of the need to comply with non-discriminatory E&R policies, i.e., selection cannot be based on the grounds of sexual orientation, religion, disability, among others.

Does expatriation deliver? Key concerns in E&R research

The costs – financial, personal, and institutional – of expatriation have been at the core of research concerns in the field. We present these under three interrelated headings: debating the 'package' of relocation, assessing the success (or otherwise) of the assignment; and sourcing: if, when and how locals may be preferential to expatriates.

Costs

Given the personal disruptions associated with relocation, including uprooting children from their schools and friends and implications for one's spouse career (Dowling et al., 2004), the expatriating organization historically sought to recognize these and compensate for them through higher remuneration, typically 5 to 30 per cent on base salary (Gomez-Mejia & Balkin, 1987). The actual costs are much higher though (Stone, 1995). Depending upon location, the typical cost of an expatriate assignment is two to three times of base salary when the following factors are taken into consideration: shipment of personal effects, the placement of children in international schools and finding suitable housing in a foreign location that would match the standards of what the assignee was used to at home or expects at the assigned location (Konopaske & Werner, 2005; Parker & Janush, 2001; Tung & Varma, 2008).

Decisions on a wide range of daily practicalities are also called for, such as: what will relocation costs cover, what kind of housing standard will be provided or allowed? Will the family get language tuition? Will they be encouraged to move their furniture and personal belongings? The pay package in itself may be a rather intricate exercise. Is it to maintain the

salary equivalence (i.e. exchange rate) or purchasing power equivalent or the free income equivalent, not to mention pension rights or health insurance? (Baruch, 2004).

Other concerns are the potential implications on local employees. For example, how to justify paying a higher salary for an expatriate doing the same or similar work to a local employee, if the firm's compensation policy is to be perceived as "consistent and fair" (Chen, Choi & Chi, 2002; Warneke & Schneider, 2011). This is a case where equity, arguably important as a principle of justice, both procedural and distributive (McFarlin & Sweeney, 1992) is merely one of several relevant variables; and "needs" (actual, perceived, regulated) may require variation in treatment (Cohen-Charash, & Spector, 2001; Deutsch, 1975). Reaching perceived legitimacy by all concerned (locals included) may be achievable by paying attention to establishing and maintaining procedural justice (Tyler, 1997) in a manner that is both transparent and fair. Thus, different types of justice can be employed to increase the legitimacy and acceptability of compensation and benefits packages. For example, when deciding on remuneration packages for similar jobs in countries where the cost of living varies, taking such variance into account would usually be considered as fair as long as the equivalence principle is maintained. At the same time, pension contributions may remain constant irrespective of the variable pay on assignment. Remuneration is a critical component that comprises one's psychological contract, expatriates included (Guzzo et al., 1994) Notwithstanding that, the relationship between perceived breach or fulfilment of a psychological contract is rather complex (Lambert, Edwards & Cable, 2003) particularly in a global context.

To these, Tornikoski, Suutari and Festing (2014) added the requirement to facilitate repatriation and the need to align expatriation policies with the rest of the firm's HRM policies. They suggest a 'total compensation package' that aims to satisfy the various needs of significant others such as impacted family members.

How successful are expatriate assignments?

Expatriate assignments are generally associated with higher risk compared to domestic assignments, at both the individual and organizational levels. For the individual, the risks include the possibility of the protagonist and family failing to adjust/adapt to the foreign location, the challenge to attain satisfactory performance within a short time without support mechanisms typically available at home and the uncertainty of securing the right position upon return (Eisenberger, Fasolo & Davis-LaMastro, 1990; Stahl, Chua, Caligiuri, Cerdin, & Taniguchi, 2009). At the personal and family level, expatriation experience can result in isolation, detachment, loss of friends/social networks at home, and in some cases additional hardships, such as relocation to less developed countries or conflict-torn zones.

For the firm, the risk pertains to whether the expatriate - the firm's embodiment abroad, can adequately represent the company's interests in the foreign location. Common sense does not always prevail. Thus, a Chinese Malay moving to China may find their expectations of China frustrated, while not meeting the expectations of their HCNs Chinese compatriots (Kaye & Taylor, 1997); while Brazilians of Japanese decent, who relocated to their ancestral homeland fail to re-adjust to Japan and its societal mores (Tsuda, 2003).

In her study of American expatriates abroad, Tung (1981) suggested that failure in international assignments *can* be as high as 30%. In a meta-analysis, Harzing (1995) showed how Tung's (1981) finding of expatriate failure has been distorted over time to suggest that expatriate failure rates hover around 40%. In general, however, the literature does suggest that, first, the rate of expatriate failure is higher than comparable assignments at home; second, that Japanese and European multinationals experience lower rates of expatriate failure (Tung, 1984); and, third, the costs of expatriation and in particular the costs of expatriation failure are much higher compared to home operation assignments (Harris & Brewster, 2002). McNulty and Inkson (2013) propose a 'return on investment' model, assessing the comprehensive costs of an assignment against its gains to the firm.

Global vs. local debate

While expatriates are pivotal to a firm's international strategy in starting-up a foreign operation or enabling control over overseas subsidiaries, Collings, Scullion and Morley (2007) suggest that firms should develop a portfolio of alternatives to traditional expatriates, typically parent country nationals (PCNs) with staffing by local employees to be considered as the default option. The employment of local nationals in key decision making positions can provide several benefits, including the engendering of trust and goodwill, dispelling the common perception of a glass ceiling for locals, i.e., the inability for local talent to progress beyond a certain level at the subsidiary of a foreign-run multinational. Also, it is usually less expensive to engage a local than to hire an expatriate, since the former does not have to be paid the incentives and other benefits that expatriates commonly enjoy. Aside from expatriates (PCNs) and host country nationals (HCNs), another frequent source of talent supply is third country nationals (TCNs). For the latter, it is important to note that much of the expatriation literature has been guided by the concept of homophily, i.e., people from culturally similar countries are better received by locals as well as expatriates experiencing less difficulty in adjusting to the countries that are culturally similar (Tung, 2016). Carr, Rugimbana, Walkom and Bolitho (2001) claim though, that when it comes to expatriates in some countries of assignment, locals may show a preference for Westerners rather than people from their own region.

Expatriation scholarship intersecting with key issues in business & management discourse

With the growth in interest in the academic community and the visibility of the field, E&R research has moved from the fringes to the center of discourse, engaging with key issues on the business & management scholarly agenda. In this section we present the particular lens E&R provides, evidencing an increased coverage of relevant topics and a better appreciation of the complexities they bear upon E&R and how, in turn, E&R deepens our understanding of such topics.

Below we expand on two areas of particular concern to business and management academics over the past decades: the management of diversity, gender in particular; and business strategy in the context of a relentless global drive for competitive efficiency and cost-effectiveness.

Diversity in the context of expatriation

Gender. An area of intersection is the role of gender. This topic, addressed in the academic literature since the early 1980s, has accumulated sufficient interest to merit several reviews (Altman & Shortland, 2008; Shortland & Altman, 2011; Hutchings & Michailova, 2014, Kumra, 2013; Shortland, 2014). While embedded in the wider arena of diversity and discrimination, nearly all the discourse on this subject to date has focused exclusively on the role of women in expatriation (also termed the double glass ceiling or glass border: Linehan & Walsh, 1999).

The core argument in this literature may be paraphrased, in reference to the well-known dictum “think manager - think male” (Schein, 1973; Schein et al., 1996), i.e.: “think expatriate - think male” (Harris, 2002). The logic follows the same principle put forward by Koenig, Eagly, Mitchell, and Ristikari for leadership (2011: 637) “Men fit cultural construals of leadership better than women do and thus have better access to leader roles and face fewer challenges in becoming successful in them”. Since the 1990s we have evidenced the numbers of female expatriates on the rise in proportion to the overall expatriate population to around 20% (Altman & Shortland, 2008), This figure has remained stagnant for over a decade now (Brookfield, 2015). Role Construal Theory (Eagly & Karau, 2002) would stipulate that in those leadership positions and roles in which men predominate and that are considered as ‘tough’ we will find a disproportionately higher number of men compared to women. Expatriation falls into this category. Historically considered as a ‘tough’ undertaking (Adler, 1984) and dominated by men, expatriation as a corporate assignment is, by all counts, biased against women. The 'trailing spouse' syndrome: a woman trailing her expatriate male partner

(Lauring & Selmer, 2010) has further reinforced this bias (for rare exception of the opposite, see Harvey & Wiese, 1998a). It should be emphasized that construing expatriation as a ‘masculine’ undertaking is a matter of perception. It has been suggested that in fact women may be more adept than men for expatriate roles (Altman & Shortland, 2001). Based on a paired comparison of 80 male and 80 female expatriates, Tung (2004) found that there was no difference in performance abroad based on gender. Furthermore, women expatriates appear to possess attributes that render them more suitable for overseas assignments, including a greater ability to, one, deal with isolation associated with working abroad; and, two, build better rapport with local nationals. These attributes are imperative to success abroad.

Race. Following from the previous section, to be more precise, one may rephrase Virginia Schein’s dictum: “think expatriate - think privileged non-minority male”. The practitioner literature is silent on the issue and no figures are available, even though non-discriminatory legislation has been in place for over half a century in the US (The Civil Rights Act of 1964) and in the Western democracies since the 1970s and 1980s. In the general management literature (i.e., non-E&R), there is a growing body of research that shows that respondents in the US, including non-whites, generally perceive leaders as white males (Rosette, Leonardelli & Phillips, 2008). Similarly, other studies suggest that black CEOs benefit from the “teddy-bear effect” more so than their white counterparts. “Teddy-bear effect” refers to individuals with baby-face features – this may stem from the general stereotype that African-Americans men are generally viewed as more threatening; therefore, the baby-face features or some other disarming behavioral mechanism tend to soften this perception (Livingston & Pearce, 2009). Likewise, Livingstone, Rosette & Washington (2012) found that black female leaders, in general, suffered less “agency penalty” than their white women counterparts.

The academic E&R literature is surprisingly silent on race/ethnicity in international assignments with some notable exceptions (Berry & Bell, 2012; Tung, 2008; Tung & Haq, 2012). In her studies of executives in China and South Korea, Tung (2008) found that while a highly qualified African-American female was deemed appropriate for appointment to head

the subsidiaries of a US multinational in China, she was not in the case of the Korean sample. Furthermore, even though the Chinese executives accepted such an appointment, some expressed reservations about how a woman of color would be received by the broader clientele. In the case of the Korean sample, however, they have no issues with appointing a highly-qualified African-American female to head the US operations of a Korean multinational because of their belief that “when in Rome, do as the Romans do”. In their study of Indian executives, Tung & Haq (2012) found that respondents were accepting of a White American female to head the Indian subsidiary of a US multinational but less so of an African-American female. Similar to the Korean executives, the Indian respondents had no problems with the appointment of an African-American female to head the US subsidiary of an Indian multinational. These studies show the interesting dynamics of the roles that race and gender can play in expatriate assignments. Furthermore, it shows the importance of context, i.e., whether the assignment was by a US or Western-based multinational to Korea or India or an assignment by a Korean or Indian multinational to the US.

Sexual orientation and other stigmas. Whereas the traditional view of a typical expatriate is a white male, either with or without trailing wife, the issue of diversity within expatriates has developed further, identifying different aspects that require attention for each population. As noted earlier, the under-representation of women entered the field long before other minority groups did, but today growing attention is given to the relevance and specific needs of populations, like those of different race (discussed in the preceding section) or people with a different sexual orientation (Gedro, Mizzi, Rocco, & van Loo, 2013; McNulty, 2015). By now, numerous countries (the Netherlands was the first) have recognized same sex marital unions and the according of spousal benefits traditionally given to heterosexual unions to same sex couples. Findings suggest that sexual minority status is viewed as both a disabler, due to unfavorable attitudes; and enabler, such as higher mobility, in expatriation (McPhail, McNulty, & Hutchings, 2014). Under the metaphorical heading of 'whiteness', Al Ariss,

Özbilgin, Tatli, and April (2014) outline a range of social categories represented at the workplace that have been highlighted as attracting discriminatory practices. Berry and Bell (2012, p. 11) unsurprisingly commented, “Their invisibility in the International Management literature sustains and reinforces gender, race and class-based disparities in globalization processes”. Hence, the task of positing the discourse on expatriation does not merely require gendering it, but also to ‘*ethnic*’ize and ‘*class*’ify it, raise issues of sexual orientation, or disability and look out for issues not currently as yet on the agenda, such as beliefs (religious/spiritual practice).

E&R and Strategic HRM

With the advent of strategic HRM as a central concern of the discipline (Schuler & Jackson, 2008) it has become accepted wisdom that an organization’s strategy should be accompanied with a matching HRM strategy (Baird & Meshoulam, 1988; Holbeche, 2009) and by the 2000s E&R researchers attention has been drawn to strategic HR (Jackson, Schuler, & Jiang, 2014).

Organizations may follow different and distinct strategies in managing E&R. In a framework developed to identify variation in organizational E&R strategies, Baruch and Altman (2002) suggest five types of organizational strategies for E&R, based on context and legacy. Context refers to its sector and industry conventions, the organization culture and tradition of industrial relations; whereas “legacy” pertains to the organization’s history and the stage of globalization the organization is at. Consequently, the extant policies and HR practices would vary, in line with the type of strategy employed.

The first type of strategy, labeled the *Global* organization, is employed by some of the world’s leading MNCs. In these corporations, characterized by a ‘strong culture’ coupled with an established history and tradition of globalization, E&R is part and parcel of an executive’s career-path, since an expatriate assignment is an essential step to progress in the firm.

The second type is labeled *Emissary*, and is characterized by an organizational culture that emphasizes loyalty and obligation. Those selected for expatriation are typically long-

serving members of this organization and the typical assignment involves dissemination of the organization's 'way of doing things' as much as control and monitoring.

The third, *Professional* type, can be found in globally oriented companies that prefer expatriates to serve as their company's representatives because of unavailability of local talent or because locals may be deemed untrustworthy. As their name implies, these expatriates' career-path often comprises a series of expatriation postings, moving from one location to another, either in the same host country or elsewhere.

The *Peripheral* is the fourth type. It may flourish in environments where the valence of crossing borders is high - a propensity that may be found in smaller countries as well as among companies operating in niche markets. There will be many employees who may wish to benefit from, even enjoy expatriation, but may not necessarily be suitable candidates. The challenge here is to make the optimal selection among the many who are willing to expatriate as well as facilitating their return.

The fifth type, termed *Expedient*, commonly occurs in the absence of a coherent strategy, i.e., where the firm does not have a history nor legacy as a global player. It fits many companies at their early stage of globalization. Such firms tend to opt for ad-hoc practices that amount to a trial-and-error approach.

Lastly, Baruch and Altman (2002) suggest that firms may operate hybrid models – using different types simultaneously or at different times, depending on particular geographies, or differentiating across populations and economies, perhaps outsourcing some activities such as training. For example, when assigning expatriates to an attractive OECD destination, the organization may opt for the Peripheral model whereas to persuade people to move to a harsh environment the Emissary or the Professional options may prove a better choice. Different institutions employ different strategies: the sector of operation is another important determining factor. The not-for profit sector typically has more limited financial resources and thus may opt for the Emissary mode in managing E&R. Similarly, the size and stage of international development may be of relevance. Transnational Corporations, in

particular larger ones, typically aim to become ‘Global’, though some may decide on the more practical mode of ‘Professional’, or employ hybrid strategies.

Another issue of strategic HR concern is remuneration that is highly relevant to people management. Research has shown that reward management has now shifted from a specific pay-focused administration to strategic total rewards (Armstrong & Murlis, 2004; McNulty, 2014). Given the complexities of remunerations and associated benefits in E&R discussed above, studies in remuneration and compensation are well represented in the E&R literature (Barkema & Gomez-Mejia, 1998; Gomez-Mejia & Balkin, 1987) even though it is under-represented in comparison with the studies of compensation in a domestic work context. As such, more research is called for in the future (Bonache, 2006).

Theoretical frameworks and E&R

Given the variety and wide ranging issues covered by the E&R literature, scholars build on and engage with several theoretical frameworks at different levels of analysis: macro, meso and micro.

Theories

While there is no overall HRM theory that addresses all issues encompassing E&R, numerous ad-hoc and mid-range theories, mostly from the behavioral sciences, are pertinent to the study of the management of people at work in international context. Here we identify theories and models that are often referred to in the study of E&R as well as examples for their utilization within the E&R literature. We group them into categories – individual agency; individual processes; organizational relationships; organizational strategy; cultural theories; gender, diversity and family studies; and system theories (Table 2). The list is intended to be representative rather than comprehensive as there are a substantial number of theories and models relevant to the study of E&R.

Insert Table 2 here

The first group comprises theories that focus on the individual as the driving agent of expatriation. Familiar theories here are Bandura's Social Learning and Social Capital Theories, Ajzen's Theory of Planned Behavior, Hall's Protean Career and Vroom's Expectancy Theory. The common assumption to these theories is of expatriation as a case of individual agency in terms of desired or undesired outcomes.

The second family of theories focuses on the individual with a stress on expatriation's key processes. The 'psychological contract' as Rousseau (1989, p. 123) conceptualized it - "an individual's beliefs regarding the terms and conditions of a reciprocal exchange agreement between that focal person and another party" is highly relevant to E&R due to the additional elements present in an overseas assignment (family relocation; housing; schooling; recreation and well-being) that are not typically covered by a standard employment contract. Berry's Acculturation theory (Berry, 1980a, b, 1990) provides useful concepts - the attraction of host culture and importance of cultural preservation that make up the four modes of acculturation (Black & Gregersen, 1991a, b).

At the micro level of analysis, an expatriate's (whether company-sponsored or self-initiated) choice of acculturation mode is also determined by the two dimensions of attraction of host culture and importance of cultural preservation. In Tung's (1998) study of American expatriates abroad, she found that the assignees typically adopt an assimilation or integration mode in expatriations to Canada and Western Europe whereas a separation mode (i.e., live in separate expatriate communities where interaction with locals is kept to a minimum outside of the workplace) is more common in assignments to less developed regions of the world and countries that are culturally distant from one's home country.

A number of theories/concepts/constructs stand out more than others at the micro level, explaining why people choose to undertake international assignments. Vroom's (1964) expectancy theory pertains to how the valence (or attractiveness) of a given outcome (such as

acquiring a global profile) that is linked to relevant expectations (career development and/or advancement) may encourage individuals to undergo the temporary inconvenience of relocating to another country. The theory, however, also posits that where expectations are not met, this might become a demotivator. It could occur where a repatriate's expectations of promotion upon return home are thwarted, thus triggering the decision to exit the company that expatriated them in the first place (Tung, 1998). In the case of SIE's repatriation, a combination of push-pull factors as well as cultural shocks encountered during expatriation can explain their intention to repatriate (Tharenou & Caulfield, 2010).

Another relevant micro theory is organizational commitment (Mathieu & Zajac, 1990) whereby the psychological contract can have unique elements (Guzzo et al., 1994). A better understanding of the nature of the psychological contract and organizational commitment (Rousseau, 1996) is relevant to our understanding of the future direction of expatriation. As more global moves take the form of SIEs, the psychological contract assumes the characteristics of the protean career (with global horizons), thus organizational commitment becomes less relevant, for example, as a tool for the organization to assign people to expatriation. The commitment may shift to the local rather than the home country operation (Aycan, 1997).

As far as selection is concerned, the homophily principle is highly relevant. Homophily (Lazarsfeld & Merton, 1954; Ibarra, 1992) essentially states that people like those who are similar to themselves. This accounts for the old boys' networks and may explain the self-selective bias that makes the majority of expatriates being men. Bem's (1981) gender schema theory advances similar predictions.

Leader-member exchange theory (Graen & Uhl-Bien, 1995; Varma & Stroh, 2001) can also be used to account for the limited deployment of certain categories of people in international assignments. LMX posits that dyad relationships between leader and member can affect performance appraisal of one's subordinate. Since the dyad relationships are typically stronger between a male leader and a male subordinate and vice-versa, where

international assignments are viewed as avenues for career advancement, male superiors will tend to select men for such positions, rather than women.

At the meso level of analysis, with a focus on headquarters-subsidary relationship, where headquarters see the level of development (institutional- and economic-wise) in the foreign country as high, there tends to be lower emphasis on exercising tight controls. In target countries where the institutional and economic environments are less developed, the need to exercise tighter control may be emphasized, thus accounting for the greater propensity to use expatriates in such locations. This serves to explain why research shows that in US operations in Canada and Western Europe, for example, HCNs and TCNs may be used more extensively, whereas in operations in China and India, there tends to be heavier reliance on the use of PCNs (Brookfield, 2015).

At the macro level of analysis, the extent to which a MNC adopts HR strategies specific to a given foreign location, depends on the firm's perceived value (attraction) or compulsion (legal regulations) of the target country's policies and practices (Bartlett & Ghoshal, 1989). This, in turn, intertwines with the extent to which the firm in question insists on preserving its own modus operandi. If the firm is receptive to the target country's HR policies and practices and open minded to changes in its own corporate culture, then an integration mode may be employed, whereby the better elements of both home and host country HR policies are followed. Where the firm subscribes to the polycentric approach, i.e., "when in Rome, do as the Romans do" or when a defensive mode is prevalent, since the only way that is perceived as right and proper is the home country's way, then essentially an assimilation or preservation mode would be manifest, respectively.

Research methods employed in the field

Our survey of E&R research reveals a range of approaches, notably qualitative, quantitative and mixed methods. Due to the wide range of issues and the multiple level of analyses, there is no single methodology that fits all aspects of the phenomena.

Furthermore, the collection of data pertaining to global assignments is more costly, time-, money- and energy-wise due to the dispersion of the population. As with many other topics, there are benefits and pitfalls associated with any type of research method. For example, cross-sectional or single 'snapshot' case study research design can be useful for examining micro and meso level issues concerned with attitudes and behavior, policies and extant practice, but could miss out on wider issues, such as broad societal changes, multi-generational effects, strategic isomorphism, global/regional taxation issues, to name but a few. Indeed, cross-sectional studies typically suffer from inability to identify causality and may be subject to common-method-bias (Podsakoff & Organ, 1986). Qualitative research can be useful for generating insights into new phenomena, as well as a practical solution when the sample size is small. Methods employed in E&R research include discourse analysis (e.g. Starr, 2009), and narrative analysis (e.g. Siljanen & Lämsä, 2009). However, as is the case with qualitative methodologies, generalizability is restricted and implications may be limited.

Quantitative methods are well represented in E&R research. Among the more common quantitative methods employed, we find regression analysis (e.g. Bozionelos, 2009; Tharenou, 2008), structural equation modeling (e.g. Lee & Sukoco, 2010) and meta-analysis (e.g. Morris & Robie, 2001). While widely employed, findings are at a risk of only scratching the surface of this complex phenomenon. The ecosystem theory postulated above highlights the dynamic interconnectivity of different aspects of E&R that are not commonly addressed by quantitative studies.

The dearth of ethnographic and longitudinal research design is particularly noticeable in E&R research (Doherty, 2013) and their deployment would be particularly useful to track life and career trajectories (Mainiero & Sullivan, 2006) relevant to international mobility.

Based on a review of 114 empirical papers published between 1991 and 2011, Shaffer, Kraimer, Chen and Bolino (2012) concluded that the tendency to use exploratory studies in E&R suggests that the field is still in its infancy, with no single dominant methodology. Over 40% of the studies are qualitative, another indication that the field is in

the early stages of theoretical development (Shah & Corley, 2006). Shortland and Altman (2011) conducted a comprehensive analysis of articles in English language academic refereed journals on corporate expatriates, with a specific reference to women, published between 1980 and 2008. They found a total of 64 relevant articles, the majority of which used a single method - either interviews or surveys. A minority (23%) used mixed methods and only a fraction (7%) employed a longitudinal design. We believe that the methodology ratios identified by Shah and Corley (2006) and by Shortland and Altman (2011) as well as the analysis provided by Shaffer et al. (2012) represent the spread of research methodologies employed in the study of E&R in general, with some notable exceptions, such as ethnographic studies (e.g. Luring & Selmer, 2009) and the use of supplementary secondary data (e.g. Belderbos & Heijltjes, 2005; Fenwick, 2005). In summary, qualitative methodologies are common in E&R research. As the field matures, we expect to see a higher proportion of quantitative and mixed-method methodologies. At the same time, since the field has yet to expand and to cover new terrain, it appears that exploratory studies of a qualitative nature will continue to account for a high proportion of published studies for some time to come.

Discussion and Conclusions

Global mobility

The field of global mobility, E&R in particular, has garnered significant research attention since the 1980s and this interest shows no signs of abating. Throughout the paper, we have shown how the treatment of E&R has progressed from generic HRM to IHRM (International Human Resource Management) to SHRM (Strategic Human Resource Management) and Talent Management. Yet, systematic reviews of research on E&R are scarce. Shaffer and colleagues' (2012) critical examination of selected empirical studies makes a welcome addition. We also benefited from reviews on particular aspects of E&R,

like Harvey and Moeller's (2009) historical review of the emergence of E&R, Thomas and Lazarova's (2006) review on adjustment and performance, and Altman and Shortland's (2008) review of women expatriates. The two general reviews by Bonache, Brewster, & Suutari (2001) and Brewster & Scullion (1997) cover publications that are over 15 years old, however. As such, this paper offers us the opportunity to address the most recent publications while conducting a systematic review of the literature to date and over time, highlighting the progress made and addressing the challenges that lie ahead.

The vast majority of the extant literature focuses on a particular type of expatriation, the traditional corporate sent assignment, to which aspects of repatriation were subsequently added. More recently with the increased attention to SIEs and the emergence of variants to the traditional corporate mode, the field has taken a turn. Deepening and widening the lens on expatriation is a hallmark of more current scholarship: E&R is now acknowledged as a complex phenomenon.

For analytical purposes it makes sense to treat E&R on separate levels of analysis: individual, organizational and national. At the individual level, the intent to pursue an international career, followed by the decision parameters to accept or reject an international assignment, family/significant others implications, the modes of acculturation, performance on assignment, repatriation or subsequent career moves, are the common themes pursued in the literature on high-skilled expatriate talent. At the organizational level, the strategic positioning of E&R and its operational execution, policies that facilitate the deployment of talent and reaching successful, cost-effective organizational outcomes, are the common themes addressed in the literature. Relatively few studies have examined in depth why organizations use E&R as an intervention tool against available alternatives, particularly in terms of return on investment (McNulty, 2014).

Finally, studies at the national level are few and far between, primarily because E&R is construed as a topic of study at the two other levels of analysis, the individual and the organization. It is mostly in those countries, like the Gulf States, where the national economy

is highly dependent on temporary labor hired en-masse from abroad, that a wider societal construal of E&R can be found (e.g. Al-Rajhi, Altman, Metcalfe & Roussel, 2006; Forstenlechner & Mellahi, 2011; Mellahi, Demirbag, & Riddle, 2011). More recently, with the war for talent and the rise of emerging markets, attention has turned to brain circulation and its impact on national competitiveness (e.g. Saxenian, 2005; Baruch, Budhwar, & Khatri, 2007; Tung, 2016).

Overall, the literature reveals E&R to be a phenomenon of high complexity and it is the interconnectivity among the different layers where the challenge for a fundamental appreciation of E&R rests. The ecosystem theory offers an overarching framework that facilitates such appreciation. What marks contemporaneity are the multitude of options available to both individuals and organizations. Organization 'X' may choose among a traditional corporate sent assignment to local hire to anything in-between (such as flexpatriates, globetrotting). Individual 'Y' may equally enact an expatriate process through responding to emerging opportunities or self-initiating, or some other form of engagement (short-term assignment, secondment, unpaid leave). The ecosystem theory can stipulate the spectrum of relevant factors and their relative push/pull forces at a given time as well as over time. As such, this overarching framework can act as a bridge in embedding career theories and concepts (e.g. the boundaryless theory, career capital, career self-management) that has, by and large, been positioned as disparate in the literature (Baruch, Szücs, & Gunz, 2015). Furthermore, an ecosystem theory can be fruitfully applied in explicating global moves, E&R included, for both individuals and organizations as well as beyond, i.e., at the national or societal levels.

We have shown the relationship of E&R to other fields of study, notably that of careers. The career literature represents an appropriate starting point to study E&R (Baruch & Bozionelos, 2011). The intelligent career (Arthur, Claman, & DeFillippi, 1995; Jones & DeFillippi, 1996) was used for understanding motives and relevance for global assignments by Dickmann and Harris, (2005) and Jokinen, Brewster and Suutari (2008). In the course of

expatriation, work and life issues become more interlinked as compared to a domestic assignment. With less organizational support in a foreign setting, expatriates and their families tend to rely more on members of the expatriate community in the target country and/or spend more time as a family to counter the isolation often associated with living abroad. In her comparative study of male versus female expatriates, Tung (2004) found that male respondents reported spending more time with their family while overseas than at home as a coping mechanism. This finding lends support to further integration of work and other facets of life (Richardson, McKenna, Dickie, & Kelliher, 2015). It was suggested that Schein's (1996) original list of career anchors should be updated to include an internationalization anchor (Suutari & Taka, 2004).

Gaining international experience can serve as a catalyst for changing people both professionally (learning new ways of doing business, different methods, etc.) and personally (Crocitto, Sullivan, & Carraher, 2005). As returning home may cause one a reverse culture shock, it is not surprising that jobs and careers would be reassessed - with a high number of repatriates voting with their feet, either as a proactive career move or disillusioned from what awaits them at their expatriating firms (Baruch et al. 2002); while others may contemplate the meaningfulness of their jobs and careers within a wider work/life reflection (Houghton, Neck & Krishnakumar, 2016).

The benefits of expatriation & Repatriation – the value added prospects for individuals and organizational

Individuals benefit from E&R in a number of ways. They acquire exposure to invaluable knowledge and gain a unique professional and personal development opportunity. As for their careers, in most cases, particularly when global experience is considered critical for future career progress, the E&R experience will be instrumental for their upward mobility. It could also serve as a springboard to a new career, whether in their home

organization, another organization in their home country, or in embarking on a global career elsewhere.

How successful the practice of expatriation is for organizations may be a contentious issue – the benefits of expatriation should be considered against the aims set for the expatriation. When the aim is exercising control, there is no other alternative to ‘being on the ground’, and the same holds true if the aim is the dissemination of the corporate culture. For the purpose of knowledge transfer, while other options exist, there is no simple way to transfer tacit knowledge in the absence of expatriates. E&R also enables a dual process of knowledge transfer, from the home country to the host country and back, as well as TCN moves. This trend is on the increase as evidenced by the prevalence of inpatriates, flexpatriates and the like. Yet, it is difficult to quantify the added value compared with costs. The fact remains that organizations continue to transfer executives as expatriates between the home country organization, its subsidiaries and affiliates overseas.

Analysis of Expatriation and repatriation

The focus of analysis in the E&R literature is on the individual, such as that observed in the career-oriented approach. An organizational perspective that encompasses managerial practices often complements this individual level analysis. An example that illustrates how individual and organizational level considerations are intertwined is how certain populations are uniquely transposed to global mobility, for example, LGBT expatriates may experience barriers and challenges, but also offer unique contributions and are more prone to global career mobility (Engle, Schlalel, Dimitriadi, Tatoglu, & Ljubica, 2015; McPhail et al., 2014).

Given the richness and diversity of the E&R phenomena, it is important to utilize a multi-level analytical framework that juxtaposes individuals, organizations and country level dynamics. At the individual level of analysis, factors influencing success or failure of expatriation span across personality and personal attitudes, cross-cultural interests and sensitivities and family relations (see, for example, Adler, 1981; Käsälä, Mäkelä, & Suutari,

2014). Personal characteristics such as communication competence are critical for expatriates' success (Holopainen & Björkman, 2005). At the team and organizational levels, relevant issues pertain to firm expectations, relationship with colleagues, training (Szkudlarek & Sumpter, 2014) and support mechanisms (e.g. mentoring: Carraher, Sullivan, & Crocitto, 2008; Mezias & Scandura, 2005). Mendenhall and Stahl (2000) pointed out how critical training and preparations are for expatriates, as well as for their families, another manifestation of the high involvement HRM needs to be for the management of expatriates. Research has shown that family issues are critical for the success or failure of expatriation. Neglecting to gain the commitment and agreement of the spouse may end with early return, even if family considerations are not acknowledged as the real cause.

At the country and cultural level of analysis, cultural distance, religious beliefs (Haslberger, 2011) and deeply ingrained traditions (such as the attitude toward women outside of the home setting) do matter. Furthermore, the definition of success or failure is fragmented. Expatriate failure was defined as an inability of the assignee to complete his/her duties abroad and therefore recalled before the end of their anticipated/contracted term of employment overseas (Tung, 1981). This definition of failure is at the meso level of analysis. At the individual level of analysis, it can include an individual's self-assessment as to whether he/she was able to accomplish organizational goals/objectives in the foreign location, as well as supervisor-based ratings. However, if multiple supervisors are used – such as host versus home country – where these ratings differ, whose opinions should count more? At this macro level of analysis, i.e., at the firm and country level, failure incorporates force majeure factors that are often beyond the control of the expatriate, such as: armed conflict, civil disorder, hyper-inflation, drastic depreciation of a host country's currency, changes in legislation that affect the functioning of the organization, and restrictive host government policies thereby lowering the ROI from the overseas subsidiary, to name a few.

Throughout this review, we have shown how context matters. Variations in the economic, legal, and socio-cultural environments are critical for the study of E&R. For example,

expatriation within OECD countries could be very different from a move from an OECD country to an emerging economy. Yet, the same staffing decision concerning an OECD national as against a TCN from a developing economy could have different consequences (on costs and adjustment, for example). In addition, the specific E&R choices by a firm depend on its overall business and HRM strategy as well as the availability and inclinations of talent. As such, this paper has aimed to weave all three levels of analysis – individuals, institutions and country level to demonstrate their dynamic interconnectivity, as implied by the ecosystem theory.

At each level of analysis, there are spillovers to other areas. At the individual level, gender and career stage intersect with familial status and wider family concerns, both the family that joins the expatriate in the host country and the family left behind, e.g. elderly parents. At the organizational level, industry characteristics intersect with gender, for example. Female expatriates were first deployed in the financial sector whereas the oil industry is heavily male-dominated (for an exception see Shortland, 2015). At the country level, the mix of local employees, expatriates, SIEs, impatriates, TCNs, migrants, illegal migrants, creates a dynamic that may have far-reaching implications on labor strictures. Thus in some Middle Eastern countries, local employees represent no more than 20% of the working population (Forstenlechner, Selim, Baruch, & Madi, 2014) with a clear structural separation between the public and private sectors, manufacturing and the services (Al-Rajhi et al., 2006).

Research insights

In this section we identify topics and themes that merit further research attention. As the field of E&R is fragmented in terms of subjects covered, theoretical underpinning and methodologies, we point out several research issues and directions.

The fragmentation of the field as evidenced by the issues of multiple theoretical perspectives identified by Arthur, Hall and Lawrence (1989) and how these may be bridged through more

precise mapping (Lee, Felps, & Baruch, 2014) to establish complementary and/or competing streams (Cerdin & Brewster, 2014). As we have shown in the paper, by building on a number of theories borrowed from different disciplines, the E&R field has become richer in perspectives. However, there is an overlap between global moves associated with expatriation and migration studies, in particular when SIEs are concerned. Whereas traditional expatriation was not conceived as a permanent move to another country, some do change plans and remain in the destination country for good. Conversely, SIEs are often associated with an intention to emigrate, or at least live in a different country for significant time period.

With high *costs of expatriation* on the increase, coupled with localization policies for a growing number of countries, particularly in emerging markets, taken in conjunction with the many alternative routes for global mobility management across borders, we believe that promising avenues for research include different populations and modes of global mobility. Regarding populations, for example, much of the research to date has focused on expatriates/SIEs from developed Western countries to other parts of the world; yet, even within this population there is little research on non-white ethnic minorities who work abroad. In light of the growth of emerging market multinationals, such as the expansion of Korean firms into India, and Chinese and Indian firms into US/Canada and Western Europe, we see the beginning of relevant literature (see Kim & Tung, 2013, for example). Clearly, the international mobility of expatriates/SIEs from less developed economies merits more research attention, as well as within large geographies of the same country. Thus, in China, with its large disparity between city and the countryside, within-country moves may not be unlike SIEs moving between countries.

Another research question pertains to the strength and magnitude of the impact of E&R. It is well known that global assignment or general global experience can either benefit or hinder career success and/or progression. The relationships between the number of global assignments and subsequent career success upon repatriation as well as the intention to quit are not linear, whereby people who experienced several global assignments had lower career

success compared with those with either no global experience or those who have extensive global experience (Kraimer, Shaffer, & Bolino, 2009). Underemployment was found to be a contributing factor to tendency to quit (see also Bolino & Feldman, 2000).

The question remains, however, what types of circumstances and in which contexts would expatriation help advance career and the overall well-being of employees, compared with no impact, or even worse, negative impact. Furthermore, what does the “general well-being of employees” translate into – improved work-life balance, acquiring new perspectives and experience not available in a domestic context (even if the expatriating organization does not appear to value it)? Studies by Tung (1998), Stahl, Miller and Tung (2002), and Kim and Tung (2013) suggest that even though expatriates from the US, Germany and Korea may not be satisfied with their respective companies’ expatriation and repatriation, they nevertheless valued the international assignment and felt that it contributed positively to their general well-being. Research on what constitutes employee well-being in global mobility merits further attention.

Return on investment – the use of econometric and/or financial measures can assist the firm to better evaluate the benefits vis-a-vis costs of E&R. The ROI is different for individuals and for organizations as well as at the national level. At the individual level of analysis, benefits include higher remuneration while abroad, opportunity for career advancement, new life experiences and improvement in general well-being, discussed earlier. Costs could be both physical (such as the challenges associated with relocating to a challenging climate or security risks) and emotional (tensions in the family over the relocation, removal from familiar social circles in a culturally distant country). At the firm level of analysis, some studies have examined the ROI of expatriation (Doherty & Dickmann, 2012; McNulty, De Cieri, & Hutchings, 2009; Scullion & Collings, 2006). The costs can be substantial due to the need to offer an attractive remuneration to the expatriate, as well as the risk of failure, poor performance or resignation while on assignment or soon-after repatriation. Yet, the benefits can be significant, such as knowledge acquisition and cultural

exchange as well as saving on the need to train locals for the role. At the national level, brain circulation and the setting of new benchmarks through the exposure to MNCs, expatriation has proved to be a potent force for change.

Global labor markets as ecosystem

We posited that global mobility can be construed as a stream within an ecosystem (Müller, 1992; Iansiti & Levien, 2004; Higgins, 2005) that has the potential to aid the understanding of the ‘why’ and ‘how’ of global mobility. A global career ecosystem operates in a constellation that is not merely economic but constitutes part of a socio-political environment (Gunz, Mayrhofer, & Tolbert, 2011). There is a significant ‘flow of talent’ across organizations, sectors, and nations whereby geographical mobility has to be positioned alongside psychological mobility (Sullivan & Arthur, 2006). Extant practices manifest how the forces in the system work, with the flow switching from solely unidirectional (expatriation from headquarters in developed countries to operations in host countries), to multidirectional, such as inpatriation, TCN, off-shoring and other types (Baruch et al., 2013) and to a counter-flow from developing economies to developed economies (Aguzzoli & Geary, 2014; Muratbekova-Touron & Pinot de Villechenon, 2013), demonstrating a shift from brain-drain to brain-circulation (Saxenian, 2005) as a consequence of the ascent of the BRICS countries, among others. The ecosystem nature of global labor markets facilitates the analysis of causes and consequences of global moves and the factors influencing them at various levels, such as the way boundaries become increasingly permeable.

Future research agenda

Presently, there are two competing trends at play. At one end, we see exponential growth in globalization, which implies a steady increase in expatriation on all its variants. While the opposite trend is a decrease in expatriation propensity – whether for individual reasons (e.g., dual-career couples), organizational (e.g. cost, failure rate) and national (e.g. taxation, cultural distance). A moderating factor could be the type of population, as we

anticipate an increase in the first trend at the top echelons, whereas at the mid-level management, we may find the opposite, i.e., a propensity to deploy local talent. Monitoring these trends and possible moderators would be a worthwhile undertaking.

Other topics that merit research attention include the study of how E&R can impact expatriates. To date, while no major impact has been found for current careers, employees with overseas work experience, in general, perceived greater internal and external opportunities (Benson & Pattie, 2008). Yet, the impact of individual choices, challenges, as well as career consequences associated with various types of global mobility (Shaffer et al., 2012) have received little research attention. A related question is the extent to which global mobility should be viewed as a normative life/career trajectory and for which populations.

Assessing the impact of E&R on and in organizations (strategy, practices, issues such as organizational justice) is of ongoing interest. Organizational practices are pivotal as they influence the prospects of success through the amount and nature of support they provide expatriates and their families. Perceived career support has been found to be positively related to perceived career prospects within the home organization and expatriate performance (van der Heijden, van Engen, & Paauwe, 2009). SIEs do not benefit from such support mechanisms (Bozionelos, 2009) although their expectations also differ.

With the expansion in both scale and scope of the phenomenon, the wider impact of E&R on business and society has become a core issue. For example, how does the development of global perspectives among senior management affect the competitive advantage of firms and subsequently, of nations? How does E&R relate to brain drain vs. brain circulation? How does gaining an international perspective affect attitudes toward multiculturalism and the rise of anti-immigration policies? How does E&R contribute to the development of cultural ambidexterity? Furthermore, is cultural ambidexterity desirable? The children of expatriates who have spent substantial portions of their young lives abroad are often referred to as “third culture kids”. How do third culture kids compare to young people without such experience?

We call for a widening of the discourse to allow for a variety of theoretical and practical approaches to highlight the multidisciplinary nature of E&R. In so doing we wish to encourage scholars to make contributions that will enhance the integration rather than the balkanization of the field.

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Figures & Tables

Figure 1: Expatriation and repatriation: An overarching framework

| | <i>Issues and factors</i> | <i>Policies & Processes</i> | <i>Outcomes</i> |
|------------------------------|---|---|---|
| Individual Level | <ul style="list-style-type: none"> • Demographic • Personality & attitudes • Family | <ul style="list-style-type: none"> • Career • Personal development • Compensation & benefits | <ul style="list-style-type: none"> • Success of Expatriation/Repatriation • Future career impact • Family implications |
| Organizational level | <ul style="list-style-type: none"> • Strategy • Policies • Practices | <ul style="list-style-type: none"> • Selection • Training • Mentoring • Performance appraisal • Repatriation | <ul style="list-style-type: none"> • Success of Expatriation/Repatriation • Talent flow management |
| National level | <ul style="list-style-type: none"> • Legal • Economic • Labor market • Cultural | <ul style="list-style-type: none"> • Employment regulations • Tax regime • Industrial relations • International relations | <ul style="list-style-type: none"> • Brain circulation/brain drain/gain • Competitive advantage • Well-being |
| Regional/Global level | <ul style="list-style-type: none"> • Political • Societal • Regionalization • Globalization | <ul style="list-style-type: none"> • Cross-border mobility | <ul style="list-style-type: none"> • Ease of movement (capital, labor, goods) |

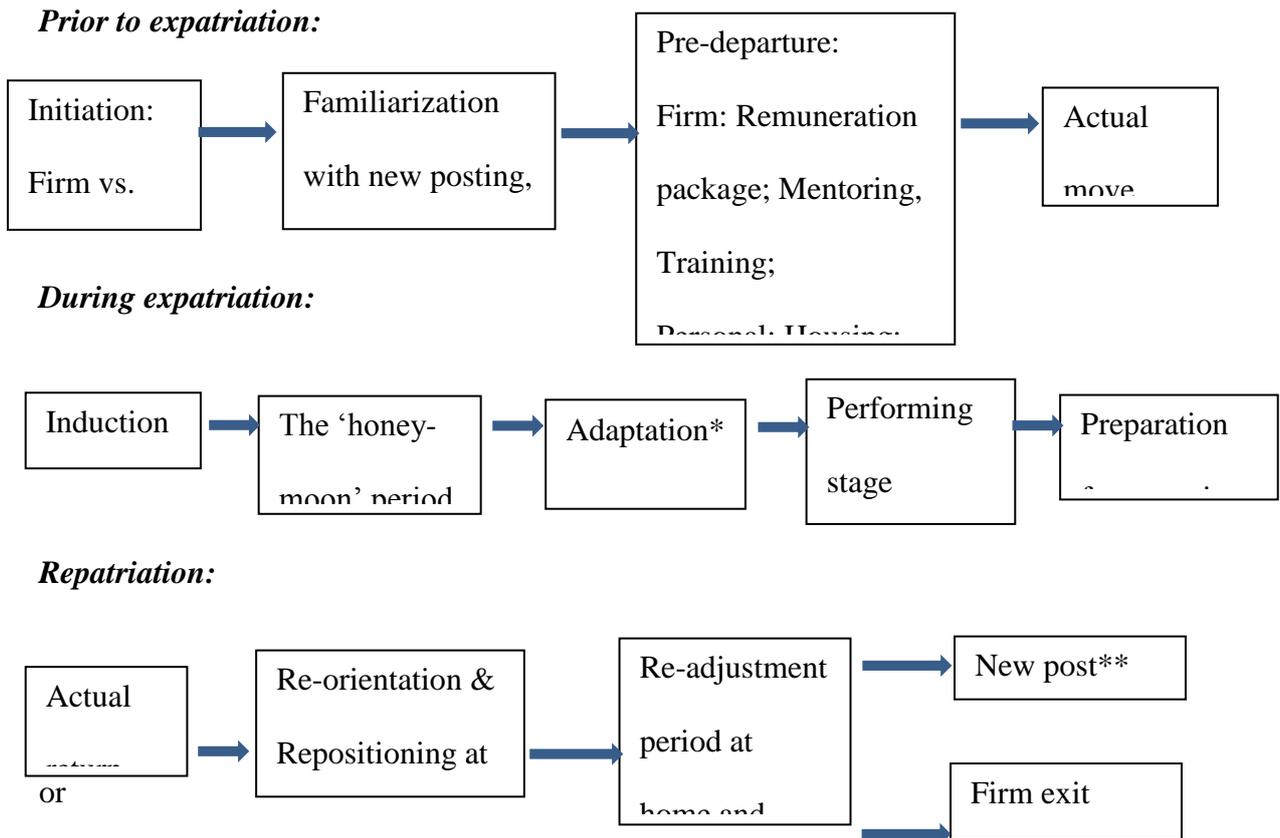
Interactions take place among relevant stakeholders – individual, organizational, national, as well as regional and global and their specific elements

External factors

Communication, technology, logistics (transportation)

Safety (terrorism), corruption; cost of living

Figure 2: The process of expatriation & repatriation:



* Potentially crisis-prone

** Subject to individual success and to firm strategy, can be 'accelerated advancement', normal progress, or dead-end post

Figure 3: The evolution of scholarship on expatriation & repatriation: Two-dimensional matrix – expansion of scope (horizontal) and complexity of detail (vertical).

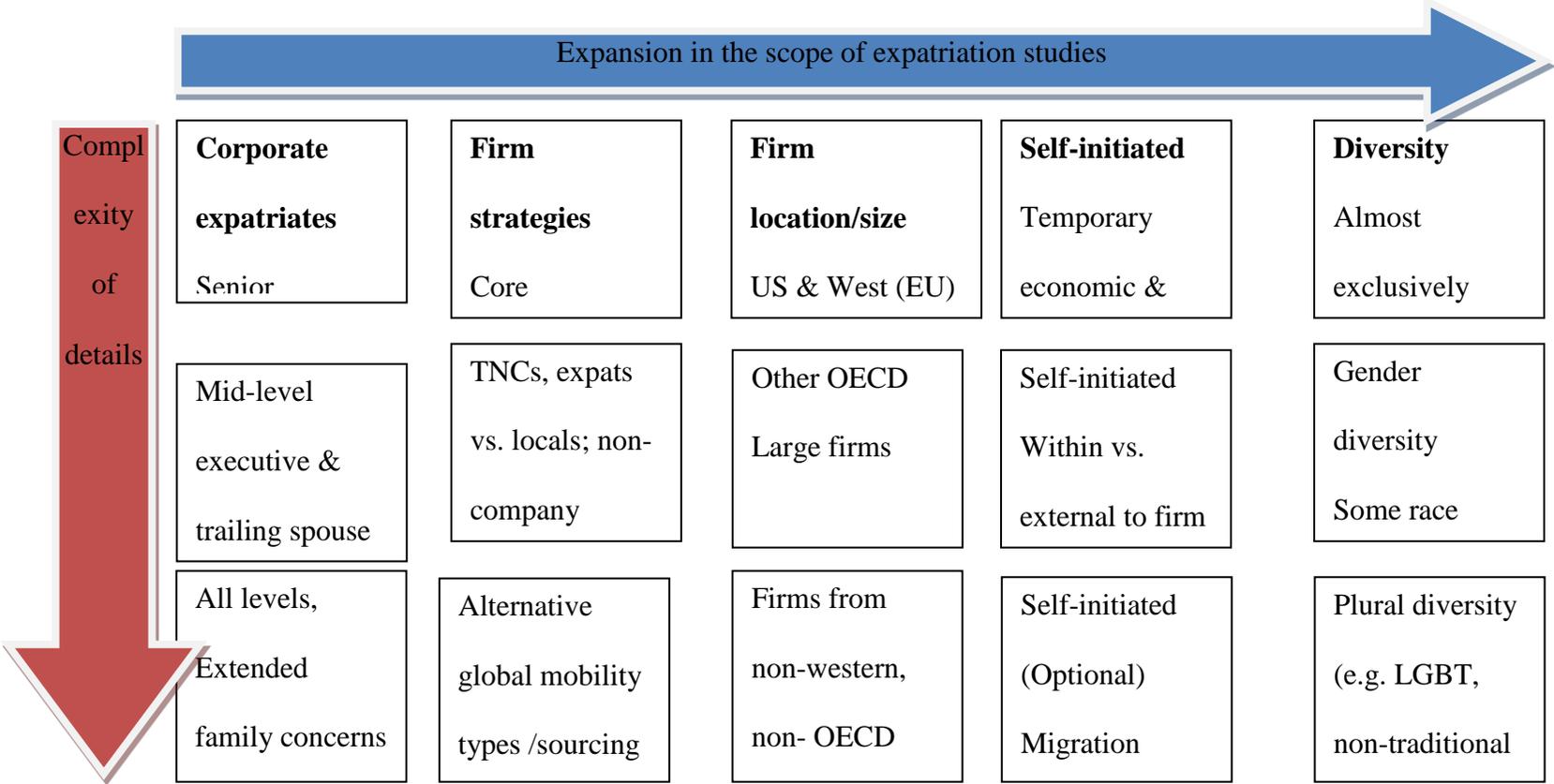


Table 1: Citations to key terms since 1980 (GoogleScholar, June 2015)

| | Expatriation | Expatriation & Repatriation | Self-initiated Expatriation |
|--------|--------------|-----------------------------|-----------------------------|
| 1980-4 | 634 | 90 | 0 |
| 1985-9 | 759 | 119 | 0 |
| 1990 | 200 | 38 | 11 |
| 1991 | 210 | 35 | 17 |
| 1992 | 228 | 57 | 15 |
| 1993 | 290 | 58 | 15 |
| 1994 | 293 | 61 | 18 |
| 1995 | 336 | 57 | 18 |
| 1996 | 364 | 68 | 51 |
| 1997 | 500 | 97 | 41 |
| 1998 | 469 | 105 | 55 |
| 1999 | 453 | 122 | 48 |
| 2000 | 600 | 139 | 34 |
| 2001 | 644 | 145 | 33 |
| 2002 | 771 | 201 | 40 |
| 2003 | 772 | 187 | 40 |
| 2004 | 930 | 244 | 38 |
| 2005 | 966 | 234 | 40 |
| 2006 | 1080 | 259 | 39 |
| 2007 | 1290 | 327 | 40 |
| 2008 | 1480 | 363 | 45 |
| 2009 | 1530 | 394 | 42 |
| 2010 | 1530 | 349 | 50 |
| 2011 | 1720 | 431 | 57 |
| 2012 | 1830 | 498 | 101 |
| 2013 | 2020 | 512 | 128 |
| 2014 | 1800 | 500 | 142 |

Table 2: Theories used in the study of expatriation and repatriation

| Theory | Lead reference(s) | Typically used in the E&R field to study: | Example for its use in E&R studies |
|---------------------------------|---|--|---|
| Individual: Agency | | | |
| Planned behavior | Ajzen & Fishbein, 1980; Fishbein & Ajzen, 1975 | Global labor mobility (micro) | Van Gelderen et al., 2008 |
| Identity | Ashforth & Mael, 1989 | The impact of change on individual identity | Cox, 2004 |
| Career theories: Protean career | Hall, 2004 | Understanding individual orientation in careers' transitions | Briscoe, Hall & Mayrhofer, 2011 |
| Expectancy | Vroom, 1964 | Motives for decision to undertake global assignments (corporate or SIE); also repatriation | Hammer et al., 1998 |
| Social capital | Lin, 2002 | Evaluation of expatriation career outcomes | Seibert, Kraimer, & Liden, 2001 |
| Social Learning | Bandura, 1977 | Characterize adjustment processes | Cox, 2004 |
| Social Cognitive | Bandura, 2001 | Analyze cognitive processes relating to global assignments | Tharenou, 2008 |
| Individual: Processes | | | |
| Acculturation | Berry, 1980 | Adjustment processes | Mendenhall & Oddou, 1985 |
| Career theories: Boundaryless | Arthur & Rousseau, 1996 | Decisions related to careers | Stahl et al., 2002 |
| Leader-Member | Graen & Uhl- | Emergent relationship in | Liu & Ipe, 2010 |

| | | | |
|---|---|---|--------------------------------------|
| Exchange | Bien, 1995 | host country | |
| Psychological contract | Schein, 1980; Rousseau, 1996 | Expatriates' expectations about personal and organizational outcomes pertaining to global assignments | Guzzo et al., 2004 |
| Stress & Coping | Cooper et al., 2001 | Identify the sources of stress and strains relating to international relocation and ways for coping with them | Westman & Etzion, 2009 |
| Organizational: Relationships | | | |
| Agency | Eisenhardt, 1989 | Relationships between host and home country and roles of position holder | Yan et al. 2002 |
| Perceived organizational support | Eisenberger et al. 1990 | Satisfaction with expatriation and repatriation | Takeuchi, Wang, Marinova & Yao, 2009 |
| Organizational: Strategy | | | |
| Global strategy | Bartlet & Ghoshal, 1989; Perlmutter, 1969 | Position firm's business global strategy with IHRM strategy | Thomas & Lazarova, 2013 |
| Cultural theories | | | |
| Cultural distance and Cultural values | Hofstede, 2001; Ronen & Shenkar, 1985; Schwartz, 1999 | Understand transition processes of expatriates and their families | Stahl & Caligiuri, 2005 |
| Culture shock | Furnham & Bochner, 1986 | Adjustment process to foreign culture | Gomez-Mejia, & Balkin, 1987 |
| Reverse culture shock | Rodrigues, 1996 | Re-adjustment process to home culture after return | Black & Gregersen, 1991b |
| Gender, diversity and family studies | | | |
| Family Dynamics/ Life | Morgan, 1996 | Work-home interface in the global context | Eikhof et al., 2007 |

| | | | |
|--------------------------------|--|--|-----------------------------------|
| balance | | | |
| Glass ceiling | Morrison 1992 | Challenge women face in global mobility context | Insch, et al., 2008 |
| Homophily | Lazarsfeld & Merton, 1954; Ibarra, 1992 | In selection, mentoring, etc. | Linehan & Walsh, 2000 |
| Work-life/family balance (WFB) | Greenhaus & Powell, 2006 | Extent to which one's work life relates/impacts family life and how to attain a healthy balance between the two. Even though WFB theorizing arose in the domestic context, it may be more exacerbated in the international context | Lyness & Judiesch, 2008 |
| System theory | | | |
| Human Capital | Becker, 1964 | Explore gains and losses in expatriation assignments | Carpenter et al., 2001 |
| Migration | Brettell & Hollifield, 2014 | Global labor mobility (macro) | Al Ariss, 2010 |
| Sensemaking | Weick, 1995 | Helping expatriates and their significant others make sense of the expatriation episode and the meaning of it for their careers, life, family, etc. | Glanz, Williams, & Hoeksema, 2001 |
| Social Exchange | Blau, 1968; Emerson, 1976 | Explore relationships within global firms and in the expatriate environment | Reiche, 2012 |