

# Research Handbook of Expatriates

*Edited by*

**Yvonne McNulty**

*School of Human Development and Social Services, Singapore University  
of Social Sciences, Singapore*

**Jan Selmer**

*Department of Management, Aarhus University, Denmark*



Cheltenham, UK • Northampton, MA, USA

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## Contributors

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**Maïke Andresen** (PhD, Helmut-Schmidt-University, Germany) is Professor of Human Resource Management at University of Bamberg in Germany. She has served as a visiting scholar at Copenhagen Business School and Tilburg University. She is a faculty member of a joint Masters programme in European Human Resource Management together with Vlerick Business School, EM Lyon, Radboud University Nijmegen, Luiss Business School and Riseba University. Maïke has contributed numerous peer-reviewed articles to leading academic journals and to edited volumes, and published and edited ten books. She currently serves on several editorial boards of academic journals and book series including *Human Resource Management Journal* and *The International Journal of Human Resource Management*. Her primary research interests are in the area of international mobility, global career management, management and organization development, work flexibilization and diversity management.

**Chris Brewster** (PhD, London School of Economics, UK) is Professor of International Human Resource Management at Henley Business School, University of Reading, UK; Nijmegen University, the Netherlands; the University of Vaasa, Finland; and ISCTE, Lisbon, Portugal. He had substantial experience as a practitioner and gained his Doctorate from the LSE before becoming an academic. He researches in the field of international and comparative HRM. Chris has consulted with major international companies and international organizations such as the UN and the EU, and taught on management programmes throughout the world. He is a frequent international conference speaker. He has written or edited around 30 books, including, recently, the *Handbook of Research on Comparative Human Resource Management*, *Managing Performance Abroad: A New Model for Understanding Expatriate Adjustment* and *Varieties of HRM: A Comparative Study of the Relationship between Context and Firm*. He has also published more than 100 book chapters and more than 200 articles in refereed journals. In 2002, Chris was awarded the Georges Petitpas Memorial Award by the practitioner body the World Federation of Personnel Management Associations in recognition of his outstanding contribution to international human resource management; and in 2006 Chris was awarded an Honorary Doctorate by the University of Vaasa, Finland.

**Leanda Care** (PhD, Monash University, Australia) is research partner with Igamix Management and Consulting, Macau and Hong Kong, consulting in Asia's casino industry. She has coordinated MBA programmes at Asia Pacific International College, Melbourne and the University of Saint Joseph, Macau, where she established the Career Centre. Leanda is currently a Contributing Editor to the *Macau Daily Times* and manages the newspaper's virtual copy-desk team. She is academic editor for research projects in the Department of Management at Monash University. Leanda is frequently invited to comment on educational policy, careers and expatriation in Macau and has presented at conferences and business seminars in USA, Australia, Italy, Portugal, and throughout Asia. She has published in leading academic journals including the *International Journal*

of *Human Resource Management*, in industry journals such as *Casino and Gaming International*, and magazines such as *Inside Asian Gaming*. She is an award-winning academic reviewer and an invited reviewer for journals and major conferences in her field. Current research interests include institutional support for mobile professionals, and academic honesty. In addition to a doctorate, Leanda holds an MBA from the Melbourne Business School, the University of Melbourne, Australia.

**Jean-Luc Cerdin** (PhD, Toulouse University, France) is Professor of Human Resource Management at ESSEC Business School in France. In addition to a Doctorate he also holds a MSc from the London School of Economics. He worked as a practitioner in human resource management before becoming an academic. He has served as a visiting professor at Rutgers University and University of Missouri St-Louis, and a visiting scholar at Wharton. He researches, publishes and consults in three primary areas: international human resource management, expatriation management, and career management. He has contributed numerous articles to academic and professional journals. He has also published books on expatriation and career management.

**Lisa Clarke** participated in the AFS Scholarship programme where she spent a year studying in Norway before acquiring a Bachelor of Arts Honours Degree in French with a Minor in Spanish (1994) from the University of the West Indies, Cave Hill Campus (UWI). She was then awarded a one-year contract to teach in France. After working in tourism for several years which saw her using her skills as far away as Kenya, armed with new qualifications of a Master of Science Degree (Distinction) in International Management (2004), she ventured into the area of Trade Negotiations at the Barbados Private Sector Trade Team and while there, attained a Certificate in International Trade Policy (2005). She also has certificates in Basic Accounting, Records Management, and Law and Business (2006). Lisa began to lecture part-time in the areas of culture and management in 2004 and to deliver workshops in French and Spanish at both the undergraduate and graduate levels at the UWI and is currently pursuing her MPhil/PhD in Management Studies with a focus on job insecurity, organizational commitment and well-being. She won a 'Distinguished Paper' award from the International Symposium on Business and Management in 2015.

**David G. Collings** (PhD, University of Limerick, Ireland) is Professor of HRM at Dublin City University Business School, Ireland, where he leads the HR Directors' Roundtable and is Joint Director of the Leadership and Talent Institute. He previously held academic appointments at the University of Sheffield, UK and National University of Ireland Galway and visiting appointments at King's College London and Strathclyde University, UK. His research and consulting interests focus on talent management and global mobility. A key focus of his recent work is on understanding how employees add value in organizations and how organizations can support key employee groups, including international assignees, in generating sustainable performance. In 2014 and 2015 he was named as one of the most influential thinkers in the field of HR by *HR Magazine* and in 2015 he was awarded the President's award for research by Dublin City University. He has published numerous papers in leading international outlets and seven books. He is currently editing *The Oxford Handbook of Talent Management* with Wayne Cascio and Kamel Mellahi. He sits on a number of editorial boards including *British Journal of Management*, *The*

*International Journal of Human Resource Management* and *Journal of Management Studies*. He is Senior Editor at *Journal of World Business* and former Editor-in-Chief of *Human Resource Management Journal* and the *Irish Journal of Management*.

**Mary Collins** (EdD, Dublin City University, Ireland) works in the organization development and talent management field. Her current role as Senior Executive Development Specialist with RCSI Institute of Leadership involves working with senior leaders in the healthcare sector to develop their management and leadership capabilities. Mary is also involved in academic work with the IOL including lecturing on a range of Masters programmes and supervises research at masters and doctoral levels. Prior to joining RCSI, Mary was Head of Talent and Learning for Deloitte Ireland for seven years. Her research focus during her professional doctorate was looking at enhancing the psychological contract of 'Generation Y' in the professional service sector to enhance performance and engagement levels. She is now a regular conference and key note speaker in this area. Mary is an Accredited Professional Executive Coach with the Association of Coaching (AC) and is qualified in the use of a range of psychometric and personality assessment instruments. Mary is a graduate member of the Psychological Society of Ireland (PSI). Mary is one of the authors of a book published in 2014 with the Institute of Chartered Accountants titled *Managing Smart People and Other Professionals*.

**Akhentoolove Corbin** (PhD, University of the West Indies) is a lecturer in the Department of Management Studies (DOMS), Cave Hill Campus at University of the West Indies. Dr Corbin leads the Group For Leadership Competitiveness and Harmony (GLEACH), which is a DOMS research group dedicated to analysing and publishing papers related to the relationships between leadership, harmony in organizations and competitive outcomes. He has published refereed papers and articles in academic journals, magazines and daily newspapers spanning areas of leadership, human resource management and culture. In addition to his PhD, Dr. Corbin holds a BSc degree in Management from the University of the West Indies and is a graduate of the London School of Economics and Political Science (LSE) where he was awarded a MSc degree in Personnel Management and Industrial Relations with Distinction. He was awarded the 'Lecturer of the Year Award' in 2006 by students of the Social Sciences Faculty. As a practitioner, Dr Corbin has extensive experience in the fields of Human Resources Management and Service Quality Management, having worked in both public and private sector organizations. Specifically, he has worked in the hospitality sector as both Human Resource Manager and HR consultant. Dr Corbin is a member of several boards: Chairman, Barbados Productivity Council; Chairman, Barbados National Human Resource Development Advisory Council; Deputy Chairman, Cave Hill Campus, University of the West Indies, Academy of Sport Advisory Board; and Member, Board of the Barbados National Art Gallery Board.

**Marian Crowley-Henry** (PhD, Lancaster University, UK) is tenured at Maynooth University, Ireland, where she teaches and researches in the broad discipline of human resource management (HRM). Her research interests are in the areas of international HRM, migration, careers and identity. Her current research includes studies on Millennials' careers, the careers of skilled migrants, and the careers of lesbian, gay, bisexual and transgender (LGBT) employees. Marian has held prior lectureships at Ceram



(now Skema) Sophia Antipolis (France) and Dublin Institute of Technology (Ireland). Her research has been published in peer-reviewed academic journals including *European Management Journal*, *Career Development International*, *Journal of Organizational Change Management* and *International Studies of Management and Organization*, as well as in edited book chapters. She regularly presents her work at international conferences. Prior to academia, Marian was employed in the Europe, Middle East and African headquarters of multinational organizations in Germany and France.

**Michael Dickmann** (PhD, London University, UK) is Professor of International Human Resource Management at Cranfield University, School of Management, UK. Michael lectures in the areas of international and strategic HRM. He first worked in Cranfield University during his PhD on International Human Resource Management (IHRM). After being the Global Head of Human Resources in a multinational corporation based in Munich, Germany he rejoined Cranfield to lead its work in the areas of national cultures, global mobility and IHRM. His research focuses on human resource strategies, structures and processes of multinational organizations, cross-cultural management, international mobility, global careers and change management. He is the director of the Cranfield MSc in Management, a highly innovative, practice-centred masters that incorporates an internship with leading-edge organizations. Michael has published more than 100 academic and professional papers and reports. He is the lead author of three books on international HRM and global careers, part of the acclaimed Routledge series on global human resource management. His latest book *International Human Resource Management – Contemporary HR Issues in Europe*, co-edited with Chris Brewster and Paul Sparrow, was published by Routledge in 2016. Since 2012 he has been the Editor of *The International Journal of Human Resource Management*. Michael has a first class Honours degree in Economics from London University and an MSc in Industrial Relations and Personnel Management from the London School of Economics and Political Science. Michael has several years of work experience with major consultancies and in industry. He has conducted a variety of consulting and research assignments with cutting edge multinational organizations mostly from the financial, automotive, telecommunications, chemical, electrical engineering and electronics industries. He has also consulted to humanitarian agencies, governments, and the United Nations. He has worked in his native Germany, Australia, the USA, Colombia, Spain and Britain, and speaks English and Spanish fluently.

**Harald Dolles** (Dr rer. pol., Friedrich-Alexander University Erlangen-Nuremberg, Germany) is Professor of Sport Management at Molde University College, Specialized University in Logistics, in Molde (Norway). He also holds a (part-time) Professorship in International Business at the University of Gothenburg, Centre for International Business Studies, Gothenburg (Sweden). Harald frequently contributes to scientific development in the fields of international business, international human resource management, Asian studies and sports management. Harald is Immediate Past Chair of the European Academy of Management (EURAM) Strategic Interest Group on 'Managing Sport', a network of academics, practitioners, athletes and sport officials whose interests revolve around aspects of internationalization, professionalization and commercialization of sports in theory and in practice. He also serves as European Editor to *Sport, Business and Management* published by Emerald. Harald has a publication stream of

articles and books, most recently ‘Advancing knowledge about governance, sponsorship and talent development in sports – Best Paper from the “Managing Sport” track at the EURAM Annual Meeting in Valencia 2014’ (*Sport Business and Management*, 2015, with Winand), *Asian Inward and Outward FDI – New Challenges in the Global Economy* (Palgrave Macmillan, 2014, with Alvstam and Ström) and *Handbook of Research on Sport and Business* (Edward Elgar Publishing, 2013, with Söderman).

**Ross Donohue** (PhD, Queensland University of Technology, Australia) is Senior Lecturer in the Department of Management at Monash University, Australia. He is a registered psychologist and a member of the Australian Psychological Society. Ross has practised as an organizational psychologist for 15 years and has provided extensive consultancy work to industry and government. His current research interests relate to personality-environment fit and career change; the professional and career development of parliamentarians; the influences of emotional intelligence and transformational leadership on career advancement and performance; psychological contracts and organizational justice; the predictors of organizational commitment; expatriate performance; and the leading indicators of occupational health and safety. Ross has published in leading international journals such as the *Journal of Vocational Behavior*, *The International Journal of Human Resource Management*, *Human Resource Development International*, *Journal of Employment Counseling*, *Safety Science and Accident, Analysis and Prevention*, and has authored book chapters on careers and employment. He has co-authored a book on *Management Research Methods* published by Cambridge University Press.

**Cheryl Doss** (PhD, Trinity Evangelical Divinity School, USA) is Associate Professor of Mission at Andrews University in Michigan, USA and director of the Institute of World Mission, the missionary training organization of the Seventh-Day Adventist world church. The child of missionaries, she served with her husband, a seminary professor, as a nurse and teacher in the country of Malawi for 16 years. After returning to the US, she attained her Doctorate in Educational Studies with a minor in Intercultural Studies and began researching and writing in the areas of missionary family transition and intercultural education for missionaries. Since joining the Institute of World Mission in 2000, she has travelled extensively teaching intercultural studies to missionaries and church leaders from around the world.

**Birnrir Egilsson** has an academic background in engineering management and sport management. Currently, he is a PhD student and lecturer at Molde University College, Specialized University in Logistics, in Molde (Norway). His research interests are targeting migration and integration issues in the sporting landscape and more recently operation management of professional institutions in sports. His PhD thesis project focuses on football, looking into the various supply chains of professional football clubs with the purpose of providing understanding of if, why and how football clubs utilize supply chain management strategies and practices.

**Anthony Fee** (PhD) is a Senior Lecturer at the University of Technology (UTS) Business School in Sydney. His research focuses on the experiences of global workers, particularly expatriates working within the international aid and development sector. He is an Associate Editor of the *Journal of Global Mobility* and the author of more than 50 articles, book chapters and conference papers, including publications in academic journals such

as *Human Relations*, *Journal of World Business* and *The International Journal of Human Resource Management*.

**Kelly L. Fisher** (PhD, Monash University, Australia) is an Assistant Professor at the College of Business and Public Policy at West Chester University, USA. She completed her PhD in 2010 where she conducted a case study on combat leadership in a cross-cultural context. Her first teaching position was delivering a '3C' cultural competency course online to deployed airmen for the Air Force Cultural and Language Center. She has published in leading journals such as *Military Psychology* and *Journal of Organizational Behavior*, and presented at conferences sponsored by the Academy of Management (national and affiliates), International Leadership Association, Australian and New Zealand Academy of Management, and Inter-University on Armed Forces and Society, among others. Her research interests are at the intersection of leadership, culture, and context. Her prior career to academe was in the United States Navy.

**Kathrin J. Hanek** (PhD, University of Michigan, USA) is an Assistant Professor of Management in the Department of Management and Marketing at the University of Dayton. Dr Hanek studies the intersections between identity, culture, and decision-making processes and outcomes, with a particular interest in conflicting identities and contexts. Her research has been published in top journals such as the *Journal of Applied Psychology* and been presented at conferences such as the Academy of Management Annual Meeting. She earned a PhD and a Master's degree in Psychology from the University of Michigan and a Bachelor's degree magna cum laude in Psychology, Economics, and English from Northwestern University. Dr Hanek has received numerous accolades including the Pat Gurin Distinguished Lecture Award from the University of Michigan and the William A. Hunt Award from Northwestern University.

**Arno Haslberger** (PhD, Johannes Kepler Universität, Austria) is a Senior Research Fellow at Middlesex University in London, UK. He researches on cross-cultural adjustment and expatriate management. His research has appeared in *Human Resource Management* (US), *Journal of Managerial Psychology*, *The International Journal of Human Resource Management*, *European Journal of International Management*, *Human Resource Management Review*, and others. He has edited a book on self-initiated expatriates with Vlad Vaiman and written a book on expatriate adjustment with Chris Brewster and Thomas Hippler. He is on the editorial board of the *European Journal of International Management* and *The International Journal of Human Resource Management*. Arno has lived and worked in the United States, United Kingdom, Germany, and Spain. Besides working in academia, he has held human resources positions in multinational corporations. In addition to his doctorate in sociology, Arno also holds a Master of Science in Industrial Relations from Loyola University, Chicago.

**Thomas Hippler** (PhD, University of Limerick, Ireland) is a Senior Lecturer in International Management at the University of Essex (UK). His research interests are in the area of global mobility management, with his current research activities focusing on international assignments and expatriate adjustment. Questions relating to conceptual and methodological considerations in expatriate adjustment research are at the core of his present work. Other interests relate to the motives for seeking or accepting global mobility opportunities. Prior to joining the University of Essex, Thomas held faculty positions

in human resource management and international business at Swansea University (UK) and Queen's University Belfast (UK). His work has been published in *Human Resource Management* (US), *The International Journal of Human Resource Management*, and others. His book (with Arno Haslberger and Chris Brewster) *Managing Performance Abroad: A New Model for Understanding Expatriate Adjustment* (Routledge Studies in Human Resource Development) was published in 2014. Thomas is a member of the Academy of Management, Academy of International Business and the International Academy of Intercultural Research. He serves on the editorial review boards of the *Journal of International Business Studies* and the *Journal of Managerial Psychology*. Thomas holds a PhD in International Human Resource Management.

**Kate Hutchings** (PhD, University of Queensland, Australia) is Professor of HRM in the Department of Employment Relations and Human Resources, Griffith University, Australia. Kate has held visiting research positions in Denmark, France, USA, and UK and has taught short courses in China and Malaysia. Kate has undertaken a range of management roles across universities, served on boards of not-for-profit organizations, and is a member of several international journal editorial boards. She has received a range of awards and commendations for her research from leading international conferences and journals. Kate has authored/edited four books, published a significant number of book chapters and journal articles and presented her research at a wide range of international conferences. Amongst others, her research has appeared in *Human Resource Management*, *Human Resource Management Journal*, *International Business Review*, *The international Journal of Human Resource Management*, *International Journal of Intercultural Relations*, *Journal of Management Studies*, *Journal of Organizational Behavior*, *Journal of World Business* and *Management International Review*. Her current research interests include: expatriate management; human resource management in developing economies; and women in international management – with a particular focus on Asia and the Middle East.

**Michael Isichei** is a PhD candidate at Dublin City University Business School, Ireland. Prior to beginning his doctorate he completed a Bachelor's degree in Business Management. He graduated with first class Honours and finished first in his class. His research interests focus on global mobility and the impact of cultural identity on receptivity to international assignments and performance while on assignments. While completing his PhD he has held a part-time lecturing appointment at Dublin City University Business School. He recently contributed to the *Encyclopedia of Human Resource Management*.

**Jakob Lauring** (PhD, Aarhus University, Denmark) is a Professor in the Department of Management, Aarhus University. Jakob's research interests are focused on different themes within international management; more specifically, expatriate management and multicultural teams (co-located and virtual). Jakob is an Associate Editor at the *Journal of Global Mobility*. Together with David Guttormsen he is editing a special issue in *International Studies of Management and Organization* on 'Neglected and silenced voices in cross-cultural management research'. Jakob has published more than 100 international articles in outlets such as *Journal of World Business*, *British Journal of Management*, *Human Resource Management Journal* and *International Business Review*.

**Liisa Mäkelä** (PhD) has completed two PhDs, one in the field of Work Psychology and another in the field of Business and Management. She works in the University of Vaasa, Department of Management, Finland as an Associate professor and her research interests lie in international workforce and related career paths, work–life interface, and occupational well-being. Another important line of Liisa’s research focuses on leadership and occupational well-being. Liisa has published her research in journals such as *Human Resource Management*, *The International Human Resource Management Journal* and *Gender, Work and Organization*, and as several book chapters.

**Yvonne McNulty** (PhD, Monash University, Australia) is Senior Lecturer, School of Human Development and Social Services at Singapore University of Social Sciences, Singapore. She has previously held academic appointments at Shanghai University, and James Cook University Singapore where she was involved in the administration of the MBA programme. She has published nearly 100 academic articles, book chapters and conference papers on expatriates and expatriation, including in *Management International Review*, *Journal of World Business*, *International Journal of Intercultural Relations*, *Employee Relations*, *Personnel Review*, *Career Development International*, *Journal of Global Mobility*, and *The International Journal of Human Resource Management*, and her research has been extensively cited in the *New York Times*, *International Herald Tribune*, *Wall Street Journal*, *Financial Times*, BBC Radio and Economist Intelligence Unit. Yvonne’s research interests include expatriate return on investment; expatriate families including the trailing spouse, dual-careers and third culture kids; expatriate divorce and the Hague Convention on International Child Abduction; expatriate entrepreneurs; expatriate crises; and non-traditional expatriates including single-parent, LGBT, split-family, overseas adoption, semi-retired, and female breadwinner families. Following a successful career in the Royal Australian Navy, Yvonne has since lived and worked as an academic in her native Australia, the USA, Singapore and China. She serves on the editorial boards of *International Journal of Business and Emerging Markets*, *International Journal of Multinational Corporation Strategy* and *Global Business and Organizational Excellence*, and is Associate Editor at the *Journal of Global Mobility* and *The International Journal of Human Resource Management*. Yvonne is the recipient of nine academic awards including the prestigious ‘Personnel Review/ANZAM Best Doctoral Dissertation Award in Australia and New Zealand’. A regular consultant for clients that include Brookfield and the Permits Foundation, Yvonne is the lead author of *Managing Expatriates: A Return on Investment Approach* with Professor Kerr Inkson (Business Expert Press).

**Ruth McPhail** (PhD) is Professor at Griffith University, Australia. She has wide experience in management consulting, human resource management and leadership, having trained management teams in Australia, China, Malaysia, Thailand, the USA and India. Dr McPhail was previously a high school educator before becoming a Director of Human Resources in industry and later joining Griffith University. Her research interests include international human resource management, LGBT expatriates, LGBTI elders and aged care, and first year preparation and transition.

**Snejina Michailova** (PhD, Copenhagen Business School, Denmark) has been Professor of International Business at the University of Auckland Business School, New Zealand since 2005. She was Visiting Professor and Distinguished Visiting Professor at Aalto

University School of Business, Finland in 2010 and 2013–2014, respectively. Her research in the areas of International Management and Knowledge Management has appeared in *Academy of Management Review*, *Academy of Management Executive*, *Journal of Management Studies*, *Journal of International Business Studies*, *Journal of World Business*, *Management International Review*, *International Business Review*, *The International Journal of Human Resource Management*, *Advances in International Management*, *Journal of International Management*, *Critical Perspectives on International Business*, *California Management Review*, *Long Range Planning*, *Management Learning*, *Journal of Knowledge Management*, *Organizational Dynamics*, *Technovation*, *Employee Relations*, *European Management Journal* and other journals. Snejina has co-edited books on cross-cultural management (Routledge), knowledge governance (Oxford University Press), women in international management (Edward Elgar Publishing), HRM in Central and Eastern Europe (Routledge) and research methodologies in non-Western contexts (Palgrave Macmillan). She is currently Associate Editor of *Critical Perspectives on International Business* and serves on the editorial boards of several academic journals. She has won numerous research awards as well as best paper and best reviewer awards.

**Miriam Moeller** (PhD, University of Mississippi, USA) is Senior Lecturer of international business at the UQ Business School, University of Queensland. She previously held a casual position at Bond University (Robina, Australia). Her primary research interest focuses on the impact of globalization on human resource management practices and processes, with a special interest in the impact on the inpatriate staffing method. Miriam's research is sensitive to global mobility as well as acculturative challenges. Her research has been published in the *Journal of International Business Studies*, *International Journal of Human Resource Management*, *Journal of World Business*, *International Journal of Intercultural Relations*, *International Business Review* and *Journal of Business Research*, among others. She serves on several editorial review boards including the *Journal of World Business* and *Journal of Leadership and Organizational Studies*.

**Braam Oberholster** (DBA) is Professor of International Business at Southern Adventist University in Tennessee, USA. In his home country South Africa, he served as lecturer and later as higher education administrator where he worked with, and administered member care to, expatriates. Prior to his current appointment he and his wife worked as a missionary expatriate family in Indonesia and Malawi in development project leadership, hospital administration, and higher education. His years of experience in three world regions (Africa, Asia, North America) equip him for the challenges cross-cultural managers face and help him to identify with missionary expatriates. He continues to be active in the international arena with presentations, research, and teaching on international business and community development topics in Argentina, China, Ghana, Kenya, Tanzania, and South Africa. His current research focuses on the areas of motivation for missionary expatriation, and exploring biblical foundations on business topics.

**Betty Jane Punnett** (PhD, New York University, USA), a native of St Vincent and the Grenadines, is Professor Emerita of International Business and Management at the Cave Hill Campus of the University of the West Indies. She has published more than 50 academic papers in a wide array of international journals. Recent books are *Management: A Developing Country Perspective*, *International Perspectives on Organizational Behavior and*

*Human Resource Management*, and *Experiencing International Business and Management*. Her research interests are culture and management, and Caribbean issues in management and global competitiveness. Professor Punnett has been a Fulbright Fellow and was made an Academic Fellow of the *International Council of Management Consulting Institutes* in 2015. She co-edited a special issue of the *Canadian Journal of Administrative Sciences* on 'Leadership in Africa and the Diaspora' in December, 2014 and a special issue 'Using Cultural Metaphors to Understand Management in the Caribbean' of the *International Journal of Cross Cultural Management* in December 2012.

**B. Sebastian Reiche** (PhD, University of Melbourne, Australia) is Associate Professor and Head of Department of Managing People in Organizations at IESE Business School in Barcelona, Spain. His research focuses on international assignments and global work, international HRM, knowledge transfer, employee retention and careers, global leadership and cross-cultural management, and has appeared in academic outlets such as *Personnel Psychology*, *Journal of International Business Studies*, *Journal of Management Studies*, *Human Resource Management*, *Journal of World Business*, *International Journal of Human Resource Management* and *Strategic Entrepreneurship Journal*, among others. Further, he is co-editor of Routledge's 6th edition textbook on *Readings and Cases in International Human Resource Management*. Sebastian has received several awards from the Academy of Management, including the International HR Scholarly Research Award in two consecutive years, the Research Excellence Award from the IESE Alumni Organization, and multiple best paper and reviewer awards. His work has also featured in the international press, including the *Financial Times*, *The Economist*, *Forbes*, *BBC Capital* and *Handelsblatt*, among others. Sebastian is Associate Editor of *Human Resource Management Journal* and Guest Editor for *Journal of Management*, serves on several editorial boards, and regularly blogs on topics related to expatriation and global work (<http://blog.iese.edu/expatriatus>).

**Julia Richardson** (PhD, University of Otago, New Zealand) is Associate Professor of Human Resource Management at Curtin Business School, Curtin University, Perth, Australia. She has a diverse range of research interests located primarily in the study of careers, including internationally mobile professionals and the impact of international mobility on career experiences and opportunities. Her most recent work has explored the experiences of internationally mobile mining engineers, as well as a 'sub-study' of internationally mobile women operating in a male-dominated industry. Julia has also conducted research on immigrant professionals in Canada and the impact of their experiences on subsequent self-identity and professional status. In a more recent study, she is exploring the career transitions of elite athletes. The majority of Julia's work draws on qualitative research methodologies, including case studies, in-depth interviews and ethnography. She has published her work in several high-quality journals including *Human Relations*, *International Journal of Management Reviews*, *Management International Review*, *Journal of World Business* and *British Journal of Management*, amongst others. She is co-author (with Michael Arthur and Svetlana Khapova) of *An Intelligent Career: Taking Responsibility for your Work and Your Life* (2017, Oxford University Press).

**Kati Saarenpää** is a Doctoral student in Management and Organizations at the University of Vaasa, Finland. Her research interests include well-being, work and family relationship,

work–family conflict, work–life balance, and coping. In her PhD research she examines how international business travellers and their partners experience travelling, what kind of negative work–family interactions couples face, and how they cope with negative work–family interactions arising as a consequence of frequent travel.

**Jan Selmer** (PhD, Stockholm University, Sweden) is Professor, Department of Management at Aarhus BSS, School of Business and Social Sciences, Aarhus University, Denmark. His research interest lies in cross-cultural management with a special focus on global mobility. For two decades, he has been an academic expatriate, most of the time in Hong Kong. He is the Founding Editor-in-Chief of the *Journal of Global Mobility: The Home of Expatriate Management Research* (Emerald). His academic production includes nine books and numerous journal articles in international peer-reviewed academic journals. His book, *Expatriate Management: New Ideas for International Business*, published in 1995 by Quorum Books, has become a classic text about the topic.

**Margaret A. Shaffer** (PhD, University of Texas Arlington, USA) is the Michael F. Price Chair of International Business at the Michael F. Price College of Business, the University of Oklahoma. Before joining UO, she was the Richard C. Notebaert Distinguished Chair of International Business and Global Studies at the Sheldon B. Lubar School of Business, the University of Wisconsin Milwaukee (UWM). She has also lived and worked in Hong Kong, a Special Administrative Region of China, for 11 years. She was a Professor of Management at the Hong Kong Baptist University, where she continues to teach as an Adjunct Professor. She also taught at the Hong Kong Polytechnic University, where she was involved in the administration of the Doctor of Business Administration programme. She is an active researcher in the areas of expatriation and cross-cultural organizational behaviour, and she has published extensively in leading academic journals, including the *Journal of Applied Psychology*, *Academy of Management Journal* and *Journal of International Business Studies*. She is on several editorial boards and is an associate editor for the *Journal of Global Mobility*.

**Romila Singh** (PhD) is an associate Professor at the Sheldon B. Lubar School of Business, the University of Wisconsin Milwaukee (UWM), USA. Romila's research focuses on examining organizational practices that influence attrition and persistence decisions of women engineers, uncovering the drivers of engineers' engagement with their workplaces, and developing effective career management practices for domestic and expatriate employees. She was a Co-Principal Investigator on two large National Science Foundation (NSF) grants that investigated engineers' persistence and turnover decisions. Romila's research has appeared in leading journals in management and vocational behaviour and has been cited in the *Harvard Business Review*, *Washington Post*, *Huffington Post* and the *Guardian*. She has also authored and co-authored several book chapters. Romila was invited to share her research findings at the National Academy of Engineering (NAE), Society for Women Engineers (SWE), American Association for University Women (AAUW), American Association for Advancement of Science (AAAS), and Women in Engineering Proactive Network (WEPAN). She currently serves on the editorial board of *Journal of Vocational Behavior* and is a Special Issues Editor for *Frontiers in Psychology*.

**Phyllis Tharenou** (PhD, University of Queensland, Australia) is the Executive Dean of the Faculty of Social and Behavioural Sciences at Flinders University, South Australia,



a position she has held since 2010. Prior to that appointment, she was the Executive Director of Social, Behavioural and Economic Sciences (SBE) at the Australian Research Council, following being a Member and Chair of the SBE College of Experts. She has held a number of other administrative and academic appointments at the University of South Australia, Monash University, University of Queensland, Griffith University and the Queensland Institute of Technology. Earlier in her career, she was Executive Director for Human Resource Management in the Public Sector Management Commission of the Queensland Public Service. In addition to a doctorate, she holds a Bachelor of Arts (First Class Honours) and Master of Psychology from the University of Queensland from which she graduated as an organizational psychologist. She is recognized for her research on gender differences in managerial career advancement, international careers, training and development, and employee self-esteem, having published over 90 publications including in the world's top journals in her field such as the *Academy of Management Journal* and *Journal of Applied Psychology*. She is a Fellow of the Society for Industrial and Organizational Psychology (United States) and of the Australian and New Zealand Academy of Management.

**Jodie-Lee Trembath** has been a lecturer in professional and business communications at universities in Vietnam and Australia, and researches and publishes in the areas of expatriate management in higher education and university communications. She is currently a PhD candidate at the Australian National University in Canberra, Australia, undertaking an organizational ethnography of expatriate academics. Jodie-Lee holds degrees in education, communication and social research methods, and has worked as an internal communications specialist in a range of international environments.

**Min Wan** (PhD, University of Wisconsin Milwaukee, USA) is an Assistant Professor at the McCoy College of Business Administration, Texas State University, USA. She earned her Master's degree in Human Resource Management from China and her Doctoral degree in Organizational Science from the University of Wisconsin Milwaukee (UWM), USA. Min Wan's research interests include work-life balance, cross-domain communication technology and cross-cultural management.

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## Foreword

*J. Stewart Black, PhD\**

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My introduction to the world of expatriates came in 1978 when I became one. Up to that point I had never lived or worked outside the United States (US). Despite no previous experience or understanding, I moved to Japan to work full-time as a young missionary. What I encountered experientially then, we empirically know now: that on many if not most dimensions of culture, Japan and the US are quite far apart. Thus, I was introduced to the challenges and rewards of being an expatriate in a fairly intense way. The differences between the language, customs, culture and religion that I knew from the US and what I experienced in Japan could not have been greater. They were so large that early in my two-year experience I briefly thought about going back home. Ironically, it was getting close to quitting that actually inspired me to dig deeper and work harder to understand and speak the language, relate more effectively to the Japanese people, and adjust to the culture in general.

Nevertheless, because I lived in more rural parts of Japan and I saw very few other expatriates in Japan, my understanding of expatriation was based on my own experience and that of other missionaries who I knew. At the time, I had little to no idea what expatriation was like for athletes, business executives, government officials and so on in Japan, or in any other country for that matter. After two years I left Japan and returned to the US, fascinated not only with Japan but also with the whole issue of expatriation.

After earning a master's degree, I returned to Japan to work as a consultant in Tokyo. This time, in addition to my own experiences as an expatriate, I witnessed the experiences of many others, including TV personalities, business people, athletes and government officials, not just from the US but also from various other countries, as they lived and worked in Japan. I knew many of these individuals well enough that I also saw how their spouses and children experienced expatriation. In addition, my work as a consultant advising Japanese companies on their international expansions gave me significant exposure to the experiences of Japanese expatriates and their families in various parts of the world. In the process I became enamoured with trying to understand the nature of expatriation and the factors that made it more and less successful. As my good friends Yvonne and Jan point out in Chapter 1, the 'Introduction' of this *Research Handbook*, back in the 1970s research on expatriates was just getting started, and even into the 1980s there was no established body of theoretical or empirical work.

Frustrated that I had many more questions than answers about expatriates and expatriation, once again I returned to the US and began my own formal study and research of expatriates and expatriation, first as a PhD student at the University of California, Irvine, and subsequently as a faculty member at Dartmouth College. Some of that empirical work, with colleagues such as Hal Gregersen, Greg Stephens and the late Lyman Porter,

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\* Professor of Management Practice in Global Leadership and Strategy, INSEAD.

and more especially the theoretical work with colleagues such as Mark Mendenhall, Gary Oddou and Hal Gregersen, had some reasonable impact on the field. However, most of my early work and that of various scholars at the time focused primarily on business managers and executives sent on international assignments, and to a lesser extent on their families. While this was and continues to be an important population of expatriates, the field has grown far beyond.

For one category of expatriates, there has been a return to the past: the study of non-corporate expatriates. Back in the 1960s and even 1970s, this was a primary category of focus. This category includes missionaries, international aid workers, government officials and military personnel. The resurgence of research about this group of expatriates is important.

Even in the area of corporate expatriates, we have also returned to the past in the study of what one might term 'career expatriates', or those who move from one international assignment to another. Back in the 1970s and 1980s many corporate expatriates had this career pattern, because once one was 'out of sight, out of mind' career-wise it was hard to go home. While this category never really disappeared, it changed. Whereas previously such an international assignment pattern was unlikely to elevate one to top corporate leadership positions, in some companies it now is the dominant path to such positions. As a consequence, research on this group has re-emerged with a strong focus on the career issues and not just the expatriation challenges.

Within the corporate expatriate category, there has been an important and necessary increase of focus not just on the 'primary' expatriate but also on the spouse and children. Importantly, this research has not only included the personal expatriation issues of these related individuals but has also focused on the interactive social systems effects.

While traditional corporate expatriates sent on assignment for three to five years have been, and remain, a key group, companies have increasingly sent individuals on short-term assignments. As a consequence, scholars have tried to understand the nature of this set of expatriates and explored what is similar and different for them versus the more traditional international assignee.

As companies have globalized and recognized the value of a network of leaders around the world who have personal knowledge of and relationships with each other, they have increasingly brought foreign nationals into corporate and 'home' office locations in the form of 'in-patriation'. As this activity has grown, so too has the research on it and our understanding of the experience of this category of expatriates.

In addition, as more individuals have moved from temporary to permanent or localized status in a given country, scholars have increasingly studied this group of expatriates. This growing body of research is trying to understand what is similar or different for those living and working in a 'foreign' country on a very long-term rather than short-term temporary basis. In addition, scholars in this area are trying to understand the nature of work role adjustment when aspects of general cultural adjustment have been rendered less relevant because the individuals have already resided in the country for some time.

What is perhaps the newest set of expatriates for study are those who have self-initiated their expatriation rather than having been sent by an organization. Changes in work visa status and approval processes within the European Union in particular, as well as other countries such as Singapore, have given rise to individuals being able to move to a new country on their own in search of job and career opportunities. Scholars in this area are

again trying to understand the expatriate experience for this set of people, and how it is similar to or different from the other categories mentioned.

From my perspective, this increase in the types of expatriates and the study of them is exceedingly helpful for the field. As is true of any scientific field, we need a pool of related yet diverse subjects in order to determine, from a theoretical standpoint and supported from an empirical perspective, what is common across types and what is unique by type. For a scientific field, this requires some scholars and researchers to look deeply within certain types of expatriates and, once enough is known within types, for other scholars to look across types.

In my view, this *Research Handbook* is a key step in that process. We now have enough research on particular types of expatriates that whole chapters in this *Research Handbook* can be dedicated to a review of that research, such as Chapter 9 in which Jan Selmer, Maike Andresen and Jean-Luc Cerdin focus on self-initiated expatriates. With the collection and review of the literature on the various categories and types of expatriates, it becomes easier to hypothesize about what is common and different, and why. This broader theory building is critical for the development of the field.

As Thomas Hippler, Arno Haslberger and Chris Brewster note in Chapter 4, the expatriate adjustment process, including the direct and interactive effects, can be conceptually quite complicated. However, this is true of any important social process. In social sciences there is no precedent for explaining 100 per cent of a phenomenon. Rather, what is needed is an understanding of the phenomenon across enough different situations that a theory can be built that identifies the dynamics that are relatively constant and why, as well as identifies dynamics that are heavily influenced by situational factors and what the most influential factors are and why. This theory building work needs to result in clearly articulated and testable hypotheses. This in turn enables the more consistent, and often more correct, operationalization of the key variables in the theory. All of this then subsequently enables the reliable comparability of results across studies.

While early work, such as my own with colleagues Mark Mendenhall and Gary Oddou, has tried to nudge the field in this direction with some modest success, more work is needed. For example, the two major meta-analytic studies done to date (Bhaskar-Shrinivas et al., 2005; Hechanova et al., 2003) used our theory as the organizing model, and while the results largely supported the theory, there were important non-significant findings. The authors of these meta-analytic studies pointed out that some of the non-significant findings may simply have been a function of different operationalization of variables rather than any underlying flaw in the theory. This is impossible to know until the field progresses to the point where different theories competing to explain the phenomenon are clear enough and contain both testable hypotheses and recommended operationalization of variables that they can engender better empirical studies that result in more definitive accumulation of evidence.

In pulling together this *Research Handbook*, Yvonne McNulty and Jan Selmer have helped the field to take an important step in this direction. The extant literature, both theoretical and empirical, is today large enough that consolidating it is a requisite step. This is exactly what the *Research Handbook of Expatriates* has done. It now remains the challenge of all scholars interested in this domain to leverage this monumental work and press forward with better theories containing testable hypotheses and solid operationalization of variables to drive better empirical work. I am confident that this new generation

of theoretical and empirical work is forthcoming and that the *Research Handbook of Expatriates* will play a pivotal role in its emergence.

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## Preface

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This book arose out of a need for an expatriate research text that combined and synthesized more than 50 years of expatriate studies in one handbook. To convey a sense of the extensiveness of expatriate research, the book is organized around the most important domains in the field: its historical roots, types of expatriates, contemporary expatriate challenges, expatriates in diverse (non-corporate) communities, conducting expatriate studies, and future directions. In this volume, our aim was to have scholars contribute in particular content areas for which they are already, or are becoming, known. This has resulted in chapter contributions from well-known and ‘famous’ scholars, as well as those who will undoubtedly be famous in the future. The goal of the *Research Handbook* is: (1) to provide readers with a solid working understanding of the field of expatriate studies; and (2) to help readers acquire a cutting-edge understanding of the key findings and issues across a broad range of expatriate research areas, from scholars who are experts in those areas. The *Research Handbook* is primarily intended for use in international human resource management, global business, international business, and international management courses at all degree levels (undergraduate, MBA, MA and PhD). In addition, scholars from other fields interested in expatriate studies will appreciate the comprehensiveness of the topics published here.

A great deal of time and effort was devoted to making this *Research Handbook* as accessible as possible. We accomplished it by ensuring that the chapter structure was consistent throughout, with nearly every chapter containing an introduction and overview, extensive review of extant literature and relevant theories, current debates, suggestions for better use of theories and empirical data (gaps), and areas for future research. We specifically requested that each set of authors position their chapter as being written by an expert whose voice we wanted to hear. The result is the most comprehensive collection of chapters by authors specializing in expatriate studies in any publication to date. All the authors can attest to the rigorous peer review and editing process their chapter underwent (often through multiple revisions) before being deemed ‘good enough’ for publication. We are thankful to all of them for their flexibility, patience and good-naturedness.

The vision for this book was borne out of Yvonne McNulty’s desire to help establish expatriate research (once and for all) as its own field of study. It is not to suggest that it was not already, but that there was yet to be published a comprehensive summary of the field’s contribution. She shared this vision at the Academy of Management Meeting in Philadelphia in 2014 with Francine O’Sullivan, a publisher of management books at Edward Elgar Publishing, who was very supportive of the idea and waited six months for a proposal to be developed. Jan Selmer graciously agreed to be co-editor and we have subsequently shared the editorial duties between us, including selection of chapter topics and authors, management of the review process, chapter revisions, editing and graphic design. In a project that has taken well over two years to complete, we have had only one disagreement along the way (about the picture on the cover!). There is much to be said

for choosing collaborators wisely, including our publisher, who it has been nothing short of wonderful to work with.

This *Research Handbook* contains six parts. It begins with an introductory chapter, which is followed by 24 chapters on different areas of expatriate research written by noted scholars in each of these topical areas. We used the editorial board listing in the *Journal of Global Mobility* as well as a list of publications in the same journal as a starting point to help identify the experts in our field and the most critical issues and topics. This initial review then led us to network with our colleagues to find and invite new expatriate researchers to join this prestigious endeavour. We hope that readers of this *Research Handbook* will come away with not just an extensive understanding of the field of expatriate studies, but also with excitement and passion for new ideas in expatriate research.

*Yvonne McNulty*  
*Jan Selmer*  
2017

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## Acknowledgements

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We dedicate this book to the memory of two colleagues: Professor Nina Cole at Ryerson University (Canada), an inaugural Associate Editor at the *Journal of Global Mobility* and a colleague and friend with a passion for expatriate studies, who passed away after a long illness on 29 December 2015; and Professor Michael Harvey at University of Arizona (USA), a highly respected and distinguished author in our field and a colleague and mentor to many, who passed away suddenly on 30 July 2016.



PART I

HISTORY OF EXPATRIATE  
STUDIES AND ITS CURRENT  
STATE OF PLAY

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# 1. Introduction: overview of early expatriate studies, 1952 to 1979

*Yvonne McNulty and Jan Selmer*

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Expatriation as a teaching and research subject has existed for more than 60 years. Although it is often assumed that the birth of expatriate studies occurred in the 1980s with publications by Rosalie Tung (1981, 1982, 1984a, 1984b, 1986, 1987, 1988a, 1988b) and J. Stewart Black (1988), or perhaps a little earlier with the now-seminal study by Anders Edstrom and Jay Galbraith (1977) about the reasons for using expatriates, a review of extant literature shows that a substantial body of expatriate research existed well before this time. While much of this early literature, and most especially pre-1970, was lacking in theoretical grounding and with only a few empirical studies published, it nonetheless provided an initial foundation upon which subsequent research and interest in expatriate studies would come to be based.

## OVERVIEW OF EARLY EXPATRIATE STUDIES – 1952 TO 1979

The field of modern expatriate studies had its earliest beginnings at the turn of the century with Lay's (1925) exposé of expatriates in the Foreign Service. While the concept of working abroad in a professional capacity did not begin to be formally studied until the 1950s, it was borne out of research in the 1920s and 1930s that looked at personnel administration, for example, with the establishment of the *Journal of Personnel Research* in 1922, and the *Society for Personnel Administration* founded in 1937 (now the *International Personnel Management Association/IPMA*). There was also an ongoing interest during the 1940s about the acculturation of overseas military personnel during World War II (Henry, 1946) and the adjustment and repatriation of post-World War II populations (Leuba, 1942; Shils, 1946; Spicer, 1945).

Formal study of expatriates began in the 1950s (e.g., Fayerweather, 1959) with the publication of articles about their training (Lesser and Peter, 1957) and selection (see Mandell, 1958; Mandell and Greenberg, 1954; Woodruff, 1952), of which the latter appeared in two of the earliest practitioner-oriented human resource management (HRM) journals: *Personnel Journal* (1928–1996; formerly the *Journal of Personnel Research* from 1922 to 1927), known as *Workforce Management* since 1997; and *Personnel Administration*, superseded by *Public Personnel Management* in 1973. A set of studies in the same decade by Gouldner (1957, 1958), in *Administrative Science Quarterly*, suggested that differences found among two types of employees ('locals' and 'cosmopolitans') reflected a significant tension between an organization's simultaneous need for both loyalty and expertise;<sup>1</sup> the precursor to what would be adapted in a substantial body of

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<sup>1</sup> Gouldner (1957, 1958) explored differences in manifest and latent organizational identities among locals

#### 4 Research handbook of expatriates

research in later decades about expatriate commitment and turnover. One journal that focused more specifically on expatriates at this time was the *International Executive* (now *Thunderbird International Business Review/TIBR*), which in 1959 published some of the first articles about the expansion of American companies abroad, including the challenges associated with managing 'overseas executives' (see Crowther, 1959; Howell and Newman, 1959; Huson, 1959; Peter and Schlesinger, 1960; Thompson, 1959; Wallace, 1959).

The formal study of expatriates in the 1950s and 1960s undoubtedly arose from three correspondingly related topics for this time. The first was a keen interest in international business and multinational firms within the American management discipline by the likes of Dunning (1958), Penrose (1959), Perlmutter (1967, 1969) and others (e.g., Fayerweather, 1969; Fouraker and Stopford, 1968; Hall, 1960; Kindleberger, 1969; Kolde and Hill, 1967; Linfield, 1960; Robinson, 1964). A second impetus came from research on inter-cultural and cross-cultural transitions; see, for example, Lundstedt's (1963) special issue on cross-cultural research in the *Journal of Social Issues* (see also Bailyn and Kelman, 1962; Berry, 1969; Gullahorn and Gullahorn, 1963; Katz and Eisenstadt, 1960; Lysgaard, 1955; Moore, 1961; Nath, 1968; Oberg, 1951, 1960; Useem et al., 1963). A third topic was related to a burgeoning field of interest about foreign students' exchange programmes and their adjustment whilst abroad and upon returning home (e.g., Bennett, 1958; Coelho, 1962; du Bois, 1956; Lambert and Bressler, 1956; Morris, 1960; Schild, 1962; Scott, 1956; Selltiz and Cook, 1962; Sewell et al., 1954; Sewell and Davidsen, 1956; Veroff, 1963), most notably with Useem and Useem's (1955) book about Western-educated Indian students' return from study abroad.

While most of the topics that we study today may appear to have emerged only within the past 30 years (since the 1980s), many were in fact first observed, studied and published in the 1960s when expatriates began to be recognized as pivotal employees likely to foster organizations' growth into international markets. For example, although the *Academy of Management Journal* was launched in April 1958, partly in response to the advent of corporate globalization, the first article alluding to the concept of 'international management' was published with Neghandi and Estafen's (1965) paper about the transfer of 'American management know-how' to different cultures and environments. Research in the 1960s focused predominantly in key areas that we have since come to know well, including overseas personnel management (now international HRM: IHRM) (Myers, 1965), and expatriates' compensation (Bivens and Greene, 1969; Patton, 1962; Schollhammer, 1969), performance (Peter and Henry, 1962a), development (Chorafas, 1967), selection (Hodgson, 1963; Ivancevich, 1969a; Peter and Henry, 1962b; Steinmetz, 1965, 1966; Triandis, 1963), knowledge transfer (Negandhi and Estafen, 1965), culture shock and cross-cultural training (Byrnes, 1966; Chemers, 1968; Harrison and Hopkins, 1967), adjustment (Deutsch and Won, 1963; Nash, 1967), and success factors (Ivancevich, 1969b; Newton Parks, 1963; Vivian, 1968). Also emerging were a number of studies of expatriates in non-corporate settings (Campbell, 1969; Gordon, 1967; Hapgood and

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and cosmopolitans, finding that differences existed between each in terms of degrees of influence, participation, propensity to accept or reject organizational rules, and informal relations. The study was important because it explored dimensions of organizational loyalty, defining cosmopolitans as being low on loyalty to the employing organization, high on commitment to specialized role skills, and likely to use an outer reference group orientation; while locals were defined in the opposite way.

Bennett, 1969; Henry, 1965, 1966; Mischel, 1965; Porter and Mitchell, 1967; Smith et al., 1963; Taylor, 1968). Notable was that, well into the 1960s, much of the literature about expatriates referred to them in other terms: for example, as 'overseas Americans' (Cleveland et al., 1960), 'overseas personnel' (Stern, 1966), 'overseas executives' (Gonzalez and Negandhi, 1967; Haider, 1966) and 'international manager' (Kiernan, 1963).

A little known but striking feature of expatriate research in the 1960s is the launch of management journals that contributed greatly (then, as well as now) to supporting the publication of expatriate studies. Among them is *Management International Review* (founded in 1960) (see Borrmann, 1968; Megginson, 1967 as examples), *Human Resource Management* (launched in 1961) (see, e.g., Steinmetz, 1965, 1966), *Columbia Journal of World Business* (launched in 1965 and now *Journal of World Business*) (Haider, 1966; Vivian, 1968), and *California Management Review* (launched in 1958) (see Negandhi, 1966 as an example). Other articles about expatriates were simultaneously published in practitioner outlets; for example, with a slew of articles appearing in *MSU Business Topics* (e.g., Gonzalez, 1967; Hodgson, 1963; Murray, 1973; Root, 1968; Schollhammer, 1969), a journal published from 1967 to 1981 by the Graduate School of Business Administration at Michigan State University.

Although it likely went completely unnoticed, one of the first 'industry reports' was published in 1966 by Enid Baird Lovell of the National Industrial Conference Board (now The Conference Board), which appeared as a short write-up in the 'research roundup' section in the *International Executive* (now *TIBR*). The 248-page ground-breaking report was based on findings of a study of 150 companies and concluded that the trend towards 'global management structures' resembled little more than primary responsibilities for international activities being delegated (or relegated) to only one international executive.

While research in the 1950s and 1960s provided the initial impetus for expatriate studies, it was not until the 1970s that a solid base of empirical and theoretical research emerged to take the field forward into what it has become today. The launch of the *Journal of International Business Studies* in March 1970 saw the study of expatriates being fuelled by a broader interest among scholars about multinational enterprises (MNEs) (e.g., Boddewyn, 1979; Johanson and Vahlne, 1977; Stobaugh, 1970) and a specific interest in international business education (see Beazley and Folks, 1975; Daniels and Radebaugh, 1975; Janavaras, 1975), with the latter guiding the establishment of courses and programmes in this 'new, unmapped area' (Terpstra, 1970, p. 89). The focus of some of this research (including in other journals) centred on MNEs' international operations (Beer and Davis, 1976; Daniels et al., 1976; Hymer, 1976; Keegan, 1974; Ringbakk, 1972; Stopford and Wells, 1972), internationalization processes (Casson, 1979; Caves, 1971, 1974; Johanson and Wiedersheim-Paul, 1975), expansion efforts (Buckley et al., 1978; Donaghue, 1973; Holt, 1973, 1977; Rhodes, 1972; Vernon, 1971), industrial relations and trade unions (Roberts, 1972; Warner and Turner, 1972), and issues related to global staffing (Chruden and Sherman, 1972; Davis, 1979; Imundo, 1974; Lewis, 1971; Newman, 1970; Smith, 1974; Zeira, 1975). Other studies and commentaries explored international management practice more broadly (Baker and Ivancevich, 1970; Beeth, 1973; Desatnick and Bennett, 1977; Lewis, 1971; Voris, 1975), and expatriates more specifically (Egan, 1976; Hays, 1972; Shetty, 1971), including a number of lengthy articles appearing in *Harvard Business Review* extolling the challenges and opportunities of managing 'international executives' (Crafts, 1979; Foote, 1977; Heenan and Keegan, 1979; Perlmutter

and Heenan, 1974; Sirota and Greenwood, 1971). It was in 1977 that the reasons why companies used expatriates began to be studied more theoretically, with the publication of Edström and Galbraith's now-famous article about the transfer of managers as a coordination and control strategy in multinational organizations, which appeared in *Administrative Science Quarterly*. Interestingly, while many scholars were suggesting an increase in the use of expatriates, others wrote about their doom, suggesting that:

[n]ot much can be done to save international executivism from disappearing gradually under the impact of growing nationalism, but companies with foreign affiliates can note the symptoms of a concerted push to discourage foreign managers and take some measures, discussed here, to prolong – possibly – the practice of placing foreign managers. (Howard, 1970, p. 11; in *Human Resource Management*)

Despite such gloomy predictions, research on expatriates continued to grow in the 1970s, with a small number of studies in non-corporate settings (Harris, 1973; Hautaluoma and Kaman, 1975; Kennedy and Dreger, 1974; Klineberg and Hull, 1979; Noer, 1974), and a much larger number of articles about corporate expatriates and their selection and recruitment (Alpander, 1973c; Baker and Ivancevich, 1971; Freemantle, 1978; Hays, 1974; Howard, 1974a; Lanier, 1979; Maddox, 1971; Miller, 1972a, 1972b; Teague, 1970; Tucker, 1974), communities (Cohen, 1977; Olden, 1979), satisfaction (Daniels, 1974; Ivancevich and Baker, 1970; Miller, 1975, 1976), families (Werkman, 1977) and compensation (Reynolds, 1997; Simone, 1979; Sonnabend, 1975; Whilte and McGowan, 1977). Critically, it was also when the first article to examine expatriate return on investment in terms of international assignment outcomes emerged as a new avenue of enquiry (see Misa and Fabricatore, 1979); a topic that would not be picked up again until the mid-2000s. Correspondingly, other empirical and conceptual studies emerged on themes that would come to dominate the field for decades to come, among them success and failure characteristics (Alpander, 1973b; Hays, 1971; Newman et al., 1978), expatriates' management styles (Alpander, 1973a, 1976), willingness to go (Miller and Cheng, 1978), performance (Stoner et al., 1972) and gender roles (Adler, 1979). During this time studies about repatriation strongly emerged as a worrying concern for MNEs (Cagney, 1975; Heenan, 1970; Howard, 1974b, 1979; Murray, 1973; Noer, 1974; Smith, 1976), thus initiating a long and extensive scholarly interest in a topic that still exists today.

The most significant topic of research to receive attention during the 1970s, and which would spawn a mass of research to come, was undoubtedly the theme of cross-cultural effectiveness (Hammer et al., 1978), including areas related to developing cross-cultural training programmes (Brein and David, 1973; Fiedler et al., 1971; Gudykunst et al., 1977; Howard, 1972; Jones, 1975; Thiagarajan, 1971; Zeira, 1979b) and improving expatriates' cross-cultural communication skills (Almaney, 1974). Another emerging topic that would similarly come to dominate the field was research about Japanese MNCs (Johnson, 1977; Pascale, 1978; Peterson and Schwind, 1977; Tsurumi, 1978; Yoshino, 1976), and Japanese management practices more broadly (e.g., Ozawa, 1979), the precursor to what would become a major focus of interest in Japanese subsidiaries in the 1980s and beyond, particularly by Black and colleagues (Black, 1988, 1990; Black and Gregersen, 1990).

During the nearly 30-year period from 1952 to 1979, the field of expatriate studies established a core group of early scholars whose names would become synonymous with research about 'international executives'. For example, Edwin Miller published a

slew of empirical and theoretical articles about expatriate selection well into the 2000s (e.g., Miller, 1972a, 1976; Stahl et al., 2002) in some of the best journals (then, and now) including the *Journal of International Business Studies* (Miller, 1972b, 1975, 1977; Miller and Cattaneo, 1982), *Management International Review* (Miller et al., 1981; Miller and Cheng, 1978; Tung and Miller, 1990) and *Academy of Management Journal* (Miller, 1973). Yoram Zeira was similarly productive up until the 2000s (e.g., Izraeli et al., 1980; Zeira, 1975, 1976b; Zeira and Banai, 1984, 1985; Zeira et al., 2004) with a substantial number of publications covering topics that heretofore had not been previously researched, such as third country nationals (TCNs) (Zeira and Harari, 1977; see also Daniels, 1974), and host country nationals (HCNs) and subsidiary management within the context of expatriation and MNEs' internationalization efforts (Harari and Zeira, 1974; Zeira, 1976a, 1979a; Zeira and Banai, 1981, 1985; Zeira and Harari, 1979a, 1979b; Zeira et al., 1975; see also Daniels, 1973; Toyne, 1976). Although long forgotten today, we owe a debt of gratitude to Cecil Howard, John Ivancevich, Yoram Ziera, Anant Negandhi and Edwin Miller (among others) for pioneering early expatriate studies.

## CONTENT AND OUTLINE OF THIS *RESEARCH HANDBOOK*

This is the first book to bring together expert researchers in the field of expatriate studies. The need for such a book is timely. The world is becoming smaller, with the international movement of individuals – as expatriates, business travellers, highly skilled workers and migrants – at an all time high. Expatriation is being increasingly researched and taught in business schools as part of broader and more general international human resource management (IHRM) and global business courses. Expatriates are increasing in their number and profile, with many different types, and many issues and challenges they must overcome. This *Research Handbook of Expatriates* brings together the work of some of the world's leading and up-and-coming scholars to present a solid overview of the field of expatriate studies to date, as well as to inform and excite future academic scholars and practitioners to the possibilities of conducting, collaborating on or utilizing research arising from expatriate studies.

Along with most scholars, we share a strong belief in the value of expatriate studies as a subject for study, teaching and research. We follow in the tradition of many others, in other fields and on other topics, to synthesize the body of research about expatriates to describe its history, their many types, and the various communities in which they live and work, as well as where future research can be directed. Several points are important to note regarding the focus of this *Research Handbook*. First, we make no apologies for the narrow focus only on expatriates (the people), as opposed to expatriation (the process). The latter has been covered well in prior handbooks (for example, *Handbook of Research in International Human Resource Management*, Stahl et al., 2012; *The Routledge Companion to International Human Resource Management*, Collings et al., 2015), whereas the former (to our knowledge) is yet to be tackled, with no handbook published that focuses specifically and only on expatriates and summarizes the literature as to how they experience living and working abroad. Notably, the distinction between expatriates and expatriation was one that we had to make again and again, even to authors in this *Research Handbook* as they refined and revised their chapters, such is the prevalence with

which these two areas of enquiry are continually confused and/or combined. Our contribution to the broader field of IHRM is to make this distinction clearer.

Second, and related to the above, we imposed no restrictions on ourselves, as editors, in selecting chapter topics that ventured beyond corporate expatriates. Rather, we deliberately set out to find those authors who are specialists in non-corporate expatriation, including fields as diverse as the military, missionary, education, aid, diplomatic corps and sports. While we did not succeed in convincing some authors to contribute to the *Research Handbook*, we are pleased that most did; and the results are impressive for the breadth and depth of coverage. We are particularly proud to include these chapters in the *Research Handbook* to expand the field of expatriate studies beyond its traditional corporate perspective. This *Research Handbook of Expatriates* is thus an inaugural edition, of which we intend there will be more as we endeavour to fill these gaps.

Lastly, although this *Research Handbook* is focused on various types of expatriates and their experiences, we felt it was important to also include a section on researching expatriates. Here, we invited well-known scholars to write opinion pieces about their experiences when undertaking expatriate studies, including the pitfalls and problems they faced along the way. These are honest, first-person accounts of expatriate research in real time. We imposed no restrictions on how these authors might present their views or structure their chapters, being free to point out both the good and the bad, their successes and embarrassing fails, to critique the field as they felt might be necessary, and to provide sound advice. These voices are rarely heard in expatriate studies and we applaud the courage of these authors in taking up our challenge.

If there was to be only one important takeaway from this *Research Handbook* it is that there are many different types of expatriates, and their utilization is not meant to be a one-size-fits-all solution. Instead the research and case studies presented here are intended to provide researchers with options and ideas to consider, and theories and frameworks to adapt, in future studies. We believe that any researcher, regardless of their methodological preferences or discipline, will find value in the content this *Research Handbook* provides.

## **Part I: History of Expatriate Studies and Its Current State of Play**

The first part of the book contains three chapters (including this one), which chart the history of expatriate studies from its inception in the 1950s to the present day. We believe that this part of the *Research Handbook* is somewhat unusual, if not entirely unique, on the basis that, unlike the typical format of review articles, we do not focus exclusively on seminal, 'famous' or high-citation studies but strive to give a thorough and balanced overview of the field from three entirely different perspectives. It begins in this chapter by us, the editors, with an overview of the early studies of expatriates from 1952 to 1979. In Chapter 2 by Yvonne McNulty and Chris Brewster, the authors provide an overview of the conceptual development of business expatriates over the past 50 years by clarifying the terms and concepts used to define them. The aim of the chapter is to establish greater construct clarity and to develop a theory-specific statement about business expatriates to guide future research. In Chapter 3 by Jan Selmer, a thematic history of expatriate studies is examined utilizing 55 years of research, from the 1960s to the 2010s, which identifies 1497 research articles and is categorized into 27 major themes and 22 minor themes, including 'hot' topics. This review shows that a few individuals have dominated the area



of expatriate studies due to the development of research themes and specific personal circumstances. These three chapters combined provide potentially the most comprehensive and thorough review of expatriate studies to date. Each perspective allows the reader to consider not just how the field has evolved over the past 60 years, but also where it is likely to be going next, including the researchers who may be at the helm and leading the way.

## **Part II: Historical and Contemporary Foundations of Expatriate Studies**

In Part II of the *Research Handbook*, the invited authors – all leaders in their specialty area – consider five important topics that constitute the historical and contemporary foundations of our field. In Chapter 4 by Thomas Hippler, Arno Haslberger and Chris Brewster, the authors argue for a reassessment of how we conceive of and study expatriate adjustment, by providing an overview of the theories and models of adjustment that have informed our thinking, and by offering an alternative model encompassing the dimensions, domains and dynamics of adjustment. In doing so, they raise questions about the meaning of adjustment and its contribution to the success of international assignments. In Chapter 5 by Leanda Care and Ross Donohue, the focus is on expatriate performance and includes a purposeful focus on the criterion space in terms of how it can be conceptualized and measured. The authors contend that the expatriate-specific performance components described in the literature be conceptualized as part of the overall context of the expatriate environment and in many cases are antecedent to, rather than components of, performance. In Chapter 6 by Lisa Clarke, Akhentoolove Corbin and Betty Jane Punnett, the leading authors in the area of expatriates to and from developed and developing countries discuss the limited literature on expatriates in this domain, by briefly considering the need for expatriates in the context of foreign direct investment (FDI), evidence of the growth in FDI between developed and developing countries, and differences between the two sets of countries as background to examining the literature on expatriates in this context. In Chapter 7 by David Collings and Michael Isichei, arguments are made for more research about the relationship between global talent management (GTM) and global mobility, particularly the implications of GTM for individual expatriates. The authors consider what GTM means for individual expatriates by using the expat cycle (pre-, during- and post-assignment stages) to consider how global talent systems impact upon the decisions individuals make around global mobility, their experiences while on assignment, and the career implications of global mobility in light of global talent systems. In Chapter 8 by Anthony Fee, we are introduced to the first comprehensive review of the research into the safety and security issues associated with expatriation and the management of expatriates. In a cutting-edge and concise format, the author elucidates the ways in which MNEs ensure the wellbeing of their expatriate staff when a crisis unfolds, using several illustrative case studies from a suite of recent empirical studies of MNCs with which the author has been involved.

## **Part III: Types of Expatriates**

The six chapters in Part III review research on different types of expatriates to illustrate the increasing complexity surrounding their employment, adjustment, performance and reasons to expatriate. The emphasis here is to illustrate that expatriates exist in different

forms, reflecting how the field of expatriate studies has evolved from its initial focus on only organizational or 'traditional' expatriates (white, Western and married males in their forties and fifties) to encompass a much broader range of employees. In Chapter 9 by Jan Selmer, Maïke Andresen and Jean-Luc Cerdin, the focus is on self-initiated expatriates (SIEs). Here the authors enhance the conceptual coherence of the notion of an SIE by proposing a definition based on a set of conceptual criteria which differentiates SIEs from other types of expatriates and international movers. In Chapter 10 by Ruth McPhail, a thorough grounding in the issues faced by lesbian, gay, bisexual, transgender and intersex (LGBTI) assignees is provided, with the author arguing that, because LGBTI employees are often in more senior positions within management in proportion to their heterosexual counterparts and therefore in the top 10 per cent of talent often targeted for international assignments, more support from practitioners is needed to help them achieve their global mobility aspirations. In Chapter 11 by Miriam Moeller and B. Sebastian Reiche, the two leading scholars in this area provide a comprehensive and technical overview of inpatriates. They argue that inpatriates have received limited exposure in extant literature, and proceed to define and distinguish characteristics of an inpatriate from those possessed by an expatriate, including the rationale for their use, with theoretical underpinnings.

In Chapter 12 by Kate Hutchings and Snejina Michailova, we hear from the two leading scholars in this area about the issues and challenges facing female expatriates. The authors present a critique of the extant literature outlining the key themes that have attracted most scholarly attention, and offer suggestions for a more inclusive view of female expatriates. In Chapter 13 by Marian Crowley-Henry and Mary Collins, we are introduced to Millennial expatriates, the youngest expatriate employees in organizations today, who are likely to constitute 75 per cent of the global workforce by 2025. The purpose of this chapter is to familiarize readers with current research on Millennial expatriates and the recognized characteristics of this group, including how their competencies, motivations and expectations differ from those of previous generations. In Chapter 14 by Liisa Mäkelä, Kati Saarenpää and Yvonne McNulty, the authors examine international business travellers, short-term assignees and international commuters, and provide an extensive and much-needed clarification of these new forms of international working. They argue that international work within organizations is not a stable and uniform phenomenon and that new policies and practices acknowledging the specific features related to these new forms of work are necessary in order to meet the challenges of employees' work-life stress.

#### **Part IV: Expatriates in Diverse Communities**

The fourth part of the *Research Handbook* is unique in bringing together scholars whose expertise lies outside the domain of corporate expatriate studies. Here, we searched far and wide for (sometimes unknown) authors who could bring new perspectives about expatriates in non-corporate (that is, diverse) communities beyond just the multinational. Ordinarily, many of these authors do not publish in the management literature where the majority of expatriate studies are found. Thus, their perspectives draw on literature that, until now, has likely not been seen in prior studies of expatriates. As the editors, we are especially proud of this part of the *Research Handbook*, not just for the added value that the perspectives bring, but also because the inclusion of these authors into the field is

likely to spark a fresh wave of collaborations and expanded thinking about the possibilities for expatriate studies in the future.

In Chapter 15 by Kelly Fisher, a United States military veteran and Air Force culture and language fellow, we are introduced to the anything-but-ordinary world of military expatriates (MEs). While scholarly studies on the ME are limited, it is generally recognized that they face professional and personal challenges beyond the typical experience for the private sector expatriate: they must not only be proficient within their occupation, but they are also held to a higher standard of conduct as demanded by their extraordinary mandate by their nation to wage violence. Repatriation from a war zone also has specific challenges for both the serving member and their family, with substance abuse, suicide and domestic violence among them. In Chapter 16, Braam Oberholster and Cheryl Doss present a thorough and thoughtful overview of missionary (religious) expatriates. Here, the authors describe the mission worldview that creates a unique and dynamic context for expatriation researchers, including the various types of missionary expatriation such as traditional (frontier), professionally qualified, spouse, community development and humanitarian, tent maker, and business as mission. An extensive literature review focuses on member care topics including family adjustments, third culture kids (TCKs), host country re-entry and adjustment, care support, burnout, persecution and motivation.

In Chapter 17 by Jan Selmer, Jodie-Lee Trembath and Jakob Luring, perspectives about expatriate academics are reviewed and critiqued, including their high non-organization-specific capital that makes them particularly mobile in the international academic labour market. Besides a definition of expatriate academics and their detailed descriptions (including university scholars, Fulbright and other scholarship holders, and other administrative individuals engaged in the tertiary education industry internationally), the chapter also features their demographic profile, motivations to move abroad, career-related risks of expatriation, experiences at the workplace and their work outcomes, theoretical development of the field, and the types of further research required. In Chapter 18, by sports migration scholars Harald Dolles and Birnir Egilsson, the top authors in the under-researched field of sports expatriates provide an insightful overview in which they argue that sport-related transfers embody unique features that arise from attachments to place, space and identities inherent in the sporting context. Using typologies of expatriates within the sports field, they show the various ways of becoming a self-initiated expatriate in sport (SIES) and suggest why more research is needed to investigate the specific IHRM challenges in professional team sports, the potentially controversial questions of labour rights and barriers, ethical approaches to international recruitment (including the under-age talent migration of 'star child athletes' as young as nine), and issues of integration, cultural adjustment and dislocation. We conclude this part of the *Research Handbook* with Chapter 19 by Anthony Fee, featuring a comprehensive and riveting review of expatriates in 'Aidland' by the leading scholar in this area. Here, the focus is on humanitarian aid and development workers, including clarification of some of the bewildering terminology, concepts and actors that populate the sector, as well as its operating context.

**Part V: Researching Expatriates and Expatriates as Researchers**

In the fifth part of the *Research Handbook* we explore how to conduct better expatriate research and suggest ways in which underutilized methodologies can be applied. Here, we showcase three opinion pieces by established scholars in our field, each with a substantial track record of undertaking and publishing expatriate studies, who were invited to share their expertise and to offer advice. In Chapter 20, Phyllis Tharenou presents her thoughts on methodological issues in expatriate studies. Using a sample of 296 empirical studies of assigned expatriates, SIEs and skilled migrants published from 2005 to 2014, comparative analyses revealed problems in construct clarity for the expatriate types, while systematic differences arose in the research paradigms employed. The author argues that research is needed to explain why researchers adopt different paradigms and whether their differences affect the results. Improvements are suggested for the research process and also to help end-users to access research results. In Chapter 21, Michael Dickmann adopts a biographical stance to share his views about conducting research for, and with, practitioners. Drawing upon a long history of personal reflections and recommendations as well as views from others who have collaborated in academic–industry projects, the author provides an insightful, practical and honest eight-step process model of academic–practitioner engagement that outlines a variety of considerations and provides recommendations for practice. Six distinct forms of academic–practitioner collaboration are presented.

In Chapter 22 we hear from Julia Richardson, where she explores the use of case studies in expatriate research and signals some of their potential advantages and challenges. By drawing on published work in the field, the author highlights the criteria for ensuring rigour in expatriate case study research, examining how those criteria might be incorporated into study design, execution and subsequent writing and publication of results and professional practice, as well as themes relating to external, conceptual and internal validity.

**Part VI: Future Directions in Expatriate Research**

In the sixth and final part of the *Research Handbook*, three important topics are introduced and summarized with a view to providing food for thought for future expatriate studies. In Chapter 23, Kathrin Hanek presents an extensive technical review of the research on biculturals, monoculturals and Adult Third Culture Kids (ATCKs) in the context of working globally. Drawing from psychological research and empirical work, the author provides an overview of the complexities around defining identity in a global context among these groups. By integrating findings across various literatures, an identity–processes–adjustment framework is presented for understanding how individual differences in identity patterns and identity management strategies produce different adjustment outcomes. In Chapter 24, Min Wan, Romila Singh and Margaret Shaffer provide an overview and summary of the relatively scarce, divergent and poorly organized research on global families. Using a summary of the literature to develop a 2 x 2 typology that reflects the traditional and non-traditional forms of global employment and family structure, the authors define the term ‘global family’ and offer an agenda for future research on the role and experiences of global families. In Chapter 25 we, the editors, conclude the *Research Handbook* with a co-authored account of our combined

experiences for successfully publishing expatriate research. The chapter is designed to give voice to perspectives about publishing for PhD candidates and early career researchers by providing a step-by-step guide that discusses the publish-or-perish dilemma, work–family challenges for female academics, what research on expatriates is most needed, the peer-review system, selecting co-authors, building a publishing pipeline, the practice of writing, and learning to embrace rejection. The chapter also provides an extensive list of references of the best books, articles, chapters, editorials and commentaries in the field of management and expatriate studies about writing and publishing.

## CONCLUSION

This introductory chapter illustrates that the field of expatriate studies is becoming (if not already) both a necessary and a dominant area of research in the broader fields of IHRM, international business and international management. While institutional perspectives have dominated much of the early research as MNEs attempted to come to grips with their need to internationalize, over time it is the individual actors engaged in the process of expatriating – expatriate employees – that have become the central stakeholders in ensuring MNEs could meet their globalization objectives. Thus, whether one has a preference for organizational- or individual-level research, the fact remains that expatriate studies is at the centre of the global staffing discipline and is here to stay. We believe that the large and comprehensive body of work that is presented here, and which is written by both good and great scholars in the field of expatriate studies, provides an important foundation for future studies of expatriates.

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