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GUEST EDITORIAL

Beyond corporate expatriation – global mobility in the sports, religious, education, and non-profit sectors

Introduction

Over the past 50 years, studies of corporate expatriates and the multinational corporations (MNCs) that employ them have dominated the field of international human resource management (IHRM; e.g. Gonzalez and Negandhi, 1967; Hays, 1971; Ivancevich, 1969; Shetty, 1971). Corporate expatriates are part of the larger cohort of “business expatriates” (see McNulty and Brewster, 2017), represented by people who work for MNCs in the private and for-profit sector, and who are sent by their organizations to work abroad or employed by businesses once already there. Early research on corporate expatriation was, at the time, both novel and insightful (see Adler, 1979; Baker and Ivancevich, 1971; Edström and Galbraith, 1977; Harvey, 1982; Hays, 1974; Henry, 1966; Howard, 1974, 1979, 1980; Imundo, 1974; Lanier, 1979; Megginson, 1967; Miller, 1972; Mincer, 1978; Murray, 1973; Oberg, 1960; Tung, 1981), with extant literature over the last half century providing a broad and well-researched foundation of the issues, challenges and opportunities it presents. Corporate expatriation has thus been well researched in the fields of IHRM (Black *et al.*, 1992; Cavusgil *et al.*, 1992; Pinto and Caldas, 2015; Schuler *et al.*, 1993; Tung, 1988), careers (Cappellen and Janssens, 2005; Carraher *et al.*, 2008; Herman and Tetrick, 2009), international management (IM; Gregersen and Black, 1995; Leung *et al.*, 2011), and international business (IB; Lazarova and Cerdin, 2007; Reiche *et al.*, 2009; Tung, 1984; Wu *et al.*, 2008). Corporate expatriation has been further studied in other disciplines such as demography and population (Green *et al.*, 1999; McKinnish, 2008), anthropology and sociology (Adeney, 1991; Useem *et al.*, 1963; Useem and Useem, 1967), diversity and inclusion (Hutchings *et al.*, 2008; Mahadevan and Zeh, 2015), migration (Favell *et al.*, 2006; Hugo, 2006; Peixoto, 2001), and disaster prevention and management (Wilson and Gielissen, 2004).

Despite such an extensive base of literature, missing from our understanding of expatriation is a broader look at global mobility across non-corporate communities. Studies in these areas are not only under-represented, but in some cases virtually non-existent (e.g. sports and arts expatriation). We argue that the dearth of research beyond corporate expatriation is likely due to a common but unnecessarily narrow conceptualization of expatriates as being sent abroad only by an MNC or for-profit business organization. This limited perspective ignores the employees and volunteers of inter- and non-governmental organizations (NGOs) and governments (armed and civil services), missionary, military, academic, and sports and arts expatriates who work outside their home country for specific organizations but who do not fall under the umbrella of “corporate” expatriation. It also ignores those who have not been sent by their employer but who expatriate of their own

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accord or elect to find employment or change employer whilst already living abroad. In Table I we provide an overview of the limited studies in these sectors.

The limited conceptualization of the expatriate experience has resulted in several challenges. First, it has led to inappropriate generalizations of existing theory and knowledge to non-corporate expatriate community contexts. Second, there may be valuable insights to be gained from other expatriate communities that can inform ongoing theory development and be usefully applied to the more traditional corporate expatriate community. Third, as our accurate understanding of the workings of IB involves significant private sector – public sector – non-profit interaction and interdependence, there are likely similar mixed-community interactions that should be studied with a broader conceptualization of the career path development and playing out of the expatriate experience; for example, Vance (2005) found foreign experience in humanitarian and missionary work as well as foreign government service as a common preceding experience leading to an eventual corporate expatriate career path. Fourth, the implicit structuring of the expatriation concept as being a predominantly corporate phenomenon unless stated otherwise has limited what has been studied as well as

Community/sector	Selected studies
Missions and theology	Befus (2001), Bikos <i>et al.</i> (2009), Cousineau <i>et al.</i> (2010), Hill (1986), Klemens and Bikos (2009), Manson and Carr (2011), Navara and James (2002), Oberholster <i>et al.</i> (2013), Oberholster and Doss (2017), Pelo (2005), Rosik and Pandzic (2008), Schwandt and Moriarty (2008), Taylor (1997), Trimble (2006)
Sport (involving relocation to play in amateur or professional leagues, for training purposes, and to coach and train sports teams)	Agergaard and Tielser (2014), Carter (2013), Dolles and Egilsson (2017), Elliott and Weedon (2011), Madichie (2009), Maguire (1994), Underwood and Glanz (2010), Weedon (2012)
Hospitality and hotel management	Causin <i>et al.</i> (2011)
Education and training (including those who relocate as professors serving as international scholars (e.g. Fulbright) or in tertiary institutions; international school teachers, administrators and staff; and other educators, e.g., ESOL teachers)	Benge (1979), Isakovic and Whitman (2013), Jones (1975), Richardson (2009), Richardson and McKenna (2002, 2003), Roberts (2015), Selmer and Lauring (2011), Selmer and Leung (2003), Sheard (2008)
Medicine	Druckman <i>et al.</i> (2014), Patel <i>et al.</i> (2000), Peytremann <i>et al.</i> (2001), Quigley <i>et al.</i> (2015)
Government civil service (diplomatic corps, public policy)	Davoine <i>et al.</i> (2013), Österberg and Jonsson (2012), Patel <i>et al.</i> (2000), Selmer and Fenner (2009), Tresch (2009), Wilkinson and Singh (2010)
Military (including active duty, retired/ veterans, and reservist expatriates)	Blakely <i>et al.</i> (2012, 2014a, b), Campbell (1969), Davids <i>et al.</i> (2013), de Burgh <i>et al.</i> (2011), Fisher (2017), Fisher and Hutchings (2013), Fisher <i>et al.</i> (2015), Jordan <i>et al.</i> (2015), Kelly (1996), McNulty <i>et al.</i> (2017), Österberg and Jonsson (2012), Peng <i>et al.</i> (2012), Schreurs and Syed (2011), Sińczuch <i>et al.</i> (2009), Tomforde and Keller (2005), Tresch (2009), Zolin and Schlosser (2013), Zuccala <i>et al.</i> (2015)
Non-profit (including aid workers, volunteers, humanitarian workers)	Burt and Carr (2011), Curling and Simmons (2010), Dahlgren <i>et al.</i> (2009), Fee and Gray (2011), Francis and Armstrong (2011), Gamble <i>et al.</i> (2013), Hudson and Inkson (2006), Inamori <i>et al.</i> (2012), McWha and MacLachlan (2011), Merlot and De Cieri (2011), Merlot <i>et al.</i> (2006)
Arts (actors, theatre directors and producers, artists, dancers, authors, photographers and other creative professions)	–

Table I.
Studies of expatriation
in non-corporate
communities

where data are collected and fieldwork conducted. Lastly, research on expatriation across communities is frequently published in disciplines other than the IHRM, careers, IM and IB fields, which may be limiting management scholars' access to the ideas, insights and challenges that global mobility in other communities presents, and which can further inform management thinking.

With this special issue, we sought to broaden our collective understanding of expatriation beyond corporate global mobility. Our inspiration was drawn from a very small number of published studies in IHRM, careers, IM, and IB across some of the communities that are our focus (see Table I), namely, diplomatic expatriates and their family issues, military expatriation, religious (missionary) expatriates, non-profit global mobility including volunteer missions and disaster preparation, sports expatriates, and academic expatriation. We define a "community" as including any of the above sectors, noting this is not an exhaustive list. In going beyond corporate expatriation, our goal is to contribute to balancing the picture that existing research provides about expatriation and global mobility in general. Specifically, this special issue aims to: address the gap in research that has not sufficiently explored expatriation in other segments of the global mobility marketplace; and, to establish the needed momentum for further research in this domain.

Articles in the special issue

The number of submissions for the special issue reflects a growing interest in non-corporate expatriation from within the management disciplines of IHRM, careers, IM, and IB, as well as across disciplines in the fields mentioned above. We received 16 submissions, two of which were desk rejected given a lack of fit with the scope of our special issue. The remaining 14 manuscripts were sent out for double-blind peer review to be evaluated by at least two reviewers and a special issue editor.

We accepted five articles and one research note, representing a 37.50 percent overall acceptance rate. Table II provides an overview of the articles in this special issue highlighting the sector of focus, chosen sample and methods, and main findings. The articles cover a variety of sectors from education and religious expatriates to non-profit workers and sports expatriation. Similarly, the sample of the studies covers a broad range of different people and groups from a variety of world regions. In the remainder of this editorial we identify major themes that help integrate the research findings across the contributions in this special issue.

Contribution to expatriate studies field

Major theme 1: expatriation for humanitarian and religious service

The growing perceived global imperative of sustainability, aimed at improving social, environmental, and economic health for all, both now and for future generations, requires the cooperative efforts of the public, for-profit, and non-profit sectors. The non-profit sector, led by the impassioned watchdog and advocacy efforts of local and international NGOs, plays a key role in the collective conscience and direction of global sustainability efforts, and greatly relies upon the workforce talents of foreign volunteers motivated by humanitarian and religious reasons in contributing their service. These particular expatriates have an important impact on NGOs' success in their active partnerships with local and multinational firms for achieving corporate social responsibility and governance goals. Thus, due to the growing involvement of NGOs and nonprofits in the global economy, the unique characteristics, needs, and activities of their growing numbers of expatriate volunteers (often comprised of westerners with increasing longevity who want to make a difference in less developed countries) requires greater

Article title and author(s)	Sector of focus	Article objectives	Chosen sample and methods	Main findings
Dolles and Egilsson: "From heroes to zeroes" – self-initiated expatriation of talented young footballers	Sports expatriation (football)	To explore various (stress) factors associated with the transition of young football players into professional football overseas; to compare successful and non-successful transitions of young footballers and the coping strategies applied	Biographical narrative interviews with 8 Icelandic players – 4 that successfully dealt with transitions and 4 that did not experience the same success	The expatriate journey for young footballers is complex, influenced by many events, expectations, conditions and pressures that affect their support web and ability to adjust; problem-focused coping strategies are more effective than emotion-focused coping Contribution: considers additional stages of player development and an array of individual and cultural factors that may have a significant role in shaping players' careers abroad
Myers, Inkson and Pringle: self-initiated expatriation (SIE) by older women: an exploratory study	International aid and development (IAD) expatriation (international volunteering); medical expatriation (contract caring)	To explore the motivation, experiences and outcomes of women over 50 who self-expatriate	21 in-depth life story interviews of contract carers and aid volunteers, reported as 8 vignette "examples"	SIE can be transformational by providing a desirable liberation from pressing mid-life issues, which can be achieved through career development, but is more commonly achieved through personal development and lifestyle changes Contribution: highlights the non-work impact of SIE on older women who self-expatriate. The effects of SIE extend beyond an organizational career focus wherein the effects can be transformational to one's personal life
Barrett, Cox and Woodward: the psychological contract of international volunteers: an exploratory study	International aid and development expatriation (international volunteering)	To investigate the psychological contracts of international volunteers in terms of their formation, content items, maintenance, and fulfillment vs breach	Interviews with 27 international volunteers from a range of international aid and development organizations	When forming PCs, international volunteers rely mainly on information they seek out themselves and obtain from co-volunteers. Once in the field, they adjust their expectations in light of their own and their co-volunteers' experiences. In the present study IADs seldom breached the modest PC expectations of their volunteers: when potential breaches occurred, volunteers adjusted their expectations downwards Contribution: the assumption in PC theory that psychological contracts are always formed between individuals and formal institutions or representatives of the organization they work for may be too limiting. The real "otherness" of the "other party" to the psychological contract referred to in Rousseau's (1989) definition needs to be taken seriously

(continued)

Table II.
Overview of articles
in the special issue

Article title and author(s)	Sector of focus	Article objectives	Chosen sample and methods	Main findings
Presbitero: religious expatriates' cultural intelligence and adaptation: the role of intrinsic motivation for successful expatriation	Religious expatriation	Provide new insights into religious expatriates' cultural intelligence, adaptation and the role of motivation	Survey of 110 religious expatriates from various religious communities	Cultural intelligence is positively and significantly related to both psychological and sociocultural adaptation; intrinsic motivation, as a type of motivation, moderates the relationship between cultural intelligence and adaptation (both psychological and sociocultural) Contribution: generates new insights into the importance of cultural intelligence and intrinsic motivation to ensure high levels of psychological and sociocultural adaptation
Mutter: the global mobility decisions of professional sailors spouses	Sports expatriation (sailing)	To identify the factors informing spousal global mobility decisions to go or to stay behind within the context of sporting expatriation, and the dynamic nature of these factors across multiple points in time	In-depth interviews with 21 spouses of professional sailors who have experienced both trailing their spouse and staying behind	Access to empathetic social support, the potential impact on children, and spouse's career were all found to influence the spouse's global mobility decision-making Contribution: provides empirical enhancement to the family relatedness of work decisions framework by (1) adding the voice of the spouse, and (2) including non-corporate perspectives
Bunnell: teachers in international schools: a neglected "middling actor" in expatriation	Education expatriation (international schools)	To add conceptual clarity to the notion that some business expatriates, such as international school teachers, exist in the "middle" of a hierarchy of expatriates. The deeper issue of the perceived status of expatriates can have implications for their well-being and adjustment		The absence of teachers within the broader socialization of expatriate communities leads to a perception that there are real forms of expatriates vs others resulting in one becoming the more legitimate form than another. The perceived inequality becomes taken for granted and assumed as the norm, i.e., it becomes a state of "doxa" Contribution: a research bias exists; corporate expatriates are seen as the original and "legitimate" version of expatriates, and thus worthy of greater discussion and attention, but at the expense of studying other expatriates (e.g. self-initiated expatriates/SIEs, low-skilled expatriates, and so on). Implies a large body of expatriates exist in the "middle" of the spectrum, being neither corporate (privileged/fully assisted) nor precariat (non-privileged/non-assisted), and who have escaped attention within the dominant AE vs SIE debate

Table II.

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attention in the expatriate literature. Research about these expatriates can further develop expatriate models of the past by generating new insights.

In this special issue, two articles explore the growth in international volunteerism. In their study, Barrett, Cox and Woodward use interviews to examine the psychological contracts of 27 international volunteers from a range of international aid and development organizations. They found that psychological contracts of international volunteers (key to their commitment to their work success and retention) included relational, transactional, and especially values-based elements. Rather than reliance on the organization's management hierarchy, these volunteer expatriates relied heavily on the support of their local peers.

In his paper, Presbitero examines the relationship between religious expatriates' cultural intelligence and their psychological and sociocultural adaptation when working in another cultural context. In his survey of 110 religious expatriates from various sectarian communities, he found that cultural intelligence is positively related to both psychological and sociocultural adaptation. In addition, intrinsic motivation moderated the relationship between cultural intelligence and both psychological and sociocultural adaptation. The study is significant as it builds on the very limited research about religious expatriates. It does so by extending how cultural intelligence can be relevant for individuals working in non-corporate contexts beyond being an enabler only for corporate global leaders and global managers. It further develops our understanding of intrinsic motivation as a driving force for people working in religious communities.

Major theme 2: early- and later-age expatriation

The temporal dimension in expatriate studies has undoubtedly dominated the field for decades, mainly in studies of adjustment and the expatriate life-cycle. Less researched are studies examining the intersection of age and gender. Two of the papers in this special issue build on the idea that expatriation occurs not just during mid-life, but also very early in one's life, as well as later in life when one becomes an empty-nester or is retired.

Myers, Inkson and Pringle's paper on older women (over 50) engaging in self-expatriation extends the SIE literature by examining a "beyond-work" frame of their motivations, experiences, and outcomes for working abroad. Here, the authors' focus on the transformational SIE experience as a mechanism through which older women liberate themselves from pressing mid-life issues and find new meaning and purpose. Their paper extends our awareness of the importance and value of the expatriate career experience within a broader conceptualization of career as "total life space" (Super, 1980). Notably, with the growth of global sustainability and social entrepreneurship, which greatly depend upon contributions of skilled volunteers, later-age SIE from developed countries is becoming of increasing importance.

Dolles and Egilsson's paper further explores the intersection of age and gender by examining the transition challenges of male teenage Icelandic footballers venturing abroad for the first time to play senior-level professional football in European leagues. Their findings suggest that young expatriate football players are not only dependent on their athletic performance to guide their transition into elite football, but also their ability to handle psychosocial, psychological and cultural challenges. Young players appear to find it difficult to adjust to their highly competitive environment and the hard-cultural football practices, resulting in a unique type of "culture shock." Correspondingly, they receive very little individualized support from the clubs' management during their transition despite that, in a cross-cultural professional football context, social support and problem-focused coping strategies were found to be enablers of successful transitions for young expatriate players.

Major theme 3: hierarchies, legitimacy, and perceived status of expatriates

Much past research on the organizational-assigned expatriate experience has presented an overly simplified picture of the social context within which an international work experience is carried out, and often from the limited perspective of the expatriate. Rather, the work of the traditional organizational-assigned expatriate often is discharged within a complex, dynamic social context involving frequent interactions with locally hired self-initiated expatriates carrying out similar responsibilities, local host country managers and lower-level employees, and other foreign professionals and service employees who also are encountering the expatriate experience – all within formal and informal power hierarchies and perceptions of status and legitimacy.

Bunnell's research note directs our attention to an overlooked yet rapidly growing distinct group of expatriate workers: teachers who are living and working abroad in international schools. He examines these expatriates as "middling actors" engaged in their work in the middle of a broader social context of other expatriates and locals, each holding greater and lesser degrees of perceived status and legitimacy that influence their work performance. Besides appropriately calling for more research on international teachers as expatriates within our global society, his work sheds new light and emphasis upon the importance of research to support greater understanding of the broader spectrum of expatriates, their social interactions, and their mutual perceptions affecting individual and organizational performance.

Major theme 4: expatriation and families

Although there is an established body of research around the sports labor movement, it has mostly focused on the athletes' own decisions to pursue their careers overseas for a variety of motivations including financial rewards, to improve their sporting performance, and the thrill of sporting success. Much of this research has centered on the migration of football players and the institutional structures that support their expatriation. Notably, the available research about sports people fails to consider the familial impact experienced when an athlete is required to relocate for their career. Indeed, there has been no study that investigates exactly which family factors are influential during sports expatriation when making the decision to expatriate or to stay behind.

Mutter's paper addresses this gap by explicitly examining factors that influence the family's preference to relocate or to stay behind when a professional sailor is asked to move abroad. Using the lens of the family relatedness of work decisions (FRWD) framework, her study draws on the lived experiences of 21 spouses who are part of a global professional sailing fraternity. The findings show that access to empathetic social support, the potential impact on children, and spouse's career were all found to influence the trailing spouse's global mobility decision-making regarding whether to go or to stay behind. Additionally, the author's qualitative approach captured the dynamic nature of the decision between the two options of going abroad vs staying behind, with implications for global families everywhere who may be struggling with considering split family (unaccompanied) work arrangements.

Conclusion

As exemplified by the four major themes captured by the six articles, this special issue provides useful insights that we hope will stimulate additional research to advance our collective understanding of expatriation beyond corporate global mobility. One important avenue for future research would be how NGOs and non-profit organizations are becoming a more critical fixture of the multinational enterprise landscape. Another would be to explore later-age SIEs from developed countries and how their expatriate experiences are understood as part of their personal legacy. As these papers implicate, there is a wealth of

research opportunities within the non-corporate field, and it is our hope that this special issue establishes the needed momentum for further research in this domain. Guest editorial

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