

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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Contents

<i>List of contributors</i>	viii
<i>Foreword by J. Stewart Black</i>	xx
<i>Preface</i>	xxiv
<i>Acknowledgements</i>	xxvi

PART I HISTORY OF EXPATRIATE STUDIES AND ITS CURRENT STATE OF PLAY

1 Introduction: overview of early expatriate studies, 1952 to 1979 <i>Yvonne McNulty and Jan Selmer</i>	3
2 The concept of business expatriates <i>Yvonne McNulty and Chris Brewster</i>	21
3 Expatriates: a thematic research history <i>Jan Selmer</i>	61

PART II HISTORICAL AND CONTEMPORARY FOUNDATIONS OF EXPATRIATE STUDIES

4 Expatriate adjustment <i>Thomas Hippler, Arno Haslberger and Chris Brewster</i>	83
5 Expatriate performance <i>Leanda Care and Ross Donohue</i>	106
6 Expatriates to and from developed and developing countries <i>Lisa Clarke, Akhentoolove Corbin and Betty Jane Punnett</i>	133
7 Global talent management: what does it mean for expatriates? <i>David G. Collings and Michael Isichei</i>	148
8 Expatriates' safety and security during crisis <i>Anthony Fee</i>	160

PART III TYPES OF EXPATRIATES

9 Self-initiated expatriates <i>Jan Selmer, Maike Andresen and Jean-Luc Cerdin</i>	187
10 Lesbian, gay, bisexual, transgender and intersex (LGBTI) expatriates <i>Ruth McPhail</i>	202

vi	<i>Research handbook of expatriates</i>	
11	Inpatriates: a review, synthesis and outlook of two decades of research <i>Miriam Moeller and B. Sebastian Reiche</i>	218
12	Female expatriates: towards a more inclusive view <i>Kate Hutchings and Snežina Michailova</i>	241
13	Millennial expatriates <i>Marian Crowley-Henry and Mary Collins</i>	261
14	International business travellers, short-term assignees and international commuters <i>Liisa Mäkelä, Kati Saarenpää and Yvonne McNulty</i>	276
PART IV EXPATRIATES IN DIVERSE COMMUNITIES		
15	Military expatriates <i>Kelly L. Fisher</i>	297
16	Missionary (religious) expatriates <i>Braam Oberholster and Cheryl Doss</i>	316
17	Expatriate academics: an era of higher education internationalization <i>Jan Selmer, Jodie-Lee Trembath and Jakob Lauring</i>	335
18	Sports expatriates <i>Harald Dolles and Birnir Egilsson</i>	350
19	Expatriates in Aidland: humanitarian aid and development expatriates <i>Anthony Fee</i>	368
PART V RESEARCHING EXPATRIATES AND EXPATRIATES AS RESEARCHERS		
20	Methodological issues in expatriate studies and future directions <i>Phyllis Tharenou</i>	393
21	Expatriate research for and with practitioners <i>Michael Dickmann</i>	416
22	Case study research on expatriates <i>Julia Richardson</i>	434
PART VI FUTURE DIRECTIONS IN EXPATRIATE RESEARCH		
23	Biculturals, monoculturals and Adult Third Culture Kids: individual differences in identities and outcomes <i>Kathrin J. Hanek</i>	451
24	Global families <i>Min Wan, Romila Singh and Margaret A. Shaffer</i>	468

25	Publishing research on expatriates: advice for PhD candidates and early career researchers <i>Jan Selmer and Yvonne McNulty</i>	490
	<i>Index</i>	529

Contributors

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.

Birnir 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.

Foreword

*J. Stewart Black, PhD**

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,

* 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

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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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 III

TYPES OF EXPATRIATES

14. International business travellers, short-term assignees and international commuters

Liisa Mäkelä, Kati Saarenpää and Yvonne McNulty

INTRODUCTION

Working internationally can be organized in several different ways for individuals (Beaverstock et al., 2010; Bozkurt and Mohr, 2011; De Cieri et al., 2007; Collings et al., 2007; Hauser and Johnson, 2013; Meyskens et al., 2009; Salt and Wood, 2012), and in this chapter we will focus on three specific types of employees that are available to organizations: international business travellers (IBTs), short-term assignees and international commuters. Some of these employees can be viewed as expatriates, as the etymology for the word ‘expatriate’ comes from the medieval Latin *expatriat*, meaning ‘gone out from one’s country’ (Stevenson, 2015; see Chapter 2 of this volume for a detailed conceptualization). Nonetheless, compared to traditional expatriates (for example, assigned expatriates or AEs) who relocate abroad for long periods of time, the common factor among these three employee types is that the period of time they spend outside the home country due to their work¹ is relatively short, varying from a few days to one year (Shaffer et al., 2012). Additionally, the employment contract is, in most cases, retained in the home country and administered under home country terms and conditions, thus indicating the intended temporary nature of these work assignments (Deloitte, 2013). Importantly, as some of these employee types are expatriates and others are not, we refer to them as ‘international employees’ due to the short-term cross-border nature of their employment.

In this chapter, we define these three types of employees in the following way. IBTs are employees who travel abroad for business reasons, at short notice and over short time spans, and maintain their family and personal lives in their nominated home country (Mayerhofer et al. 2004). IBTs have been conceptualized alternately as business travellers (EY, 2016), extended business travellers (EBTs) (KPMG, 2008; Brookfield Global Relocation Services, 2016), flexpatriates (Mayerhofer et al., 2004), frequent business travellers (FBTs) (Baker and Ciuk, 2015; Demel and Mayerhofer, 2010) as well as international business travellers (IBTs) (Andresen and Bergdolt, 2016; Welch and Worm, 2006; Welch et al., 2007), being defined as employees who engage in frequent business trips from the home country to international destinations (Beaverstock et al., 2010; Meyskens et al., 2009). While extant literature conceptualizes IBTs as being sent abroad at the request of an employer, there is nothing to suggest that IBTs cannot also be self-employed (see Andresen et al., 2014). Cartus (2012) found in a global survey that 60 per cent of

¹ By ‘work’, we mean legally paid professional employment for the purposes of career advancement, among employees who typically have a combination of a university degree, managerial position, highly specialized skill set with commensurate experience, and/or ‘C-suite’ credentials. To narrow our focus, it excludes unskilled workers who engage in cross-border work activities, such as construction workers, domestic helpers, and the like.

organizations expect to see an increase in their use of IBTs. Similarly, EY (2016) found that 54 per cent of organizations participating in a global mobility effectiveness survey have (international) business traveller policies in place.

It has been suggested that IBTs and flexpatriates should be conceptually separated and studied as different types of international employees, on the grounds that flexpatriates work abroad for periods of between one and two months, whereas IBTs do so (typically) for periods of between one and three weeks (Andresen and Bergdolt, 2016; Beaverstock et al., 2010; Shaffer et al., 2012). However, we have not found empirical studies using this categorization, and in this chapter we include flexpatriates within the group of IBTs, noting that future studies might consider separating them. Importantly, when we say 'nominated home country' this does not necessarily imply that all left-behind families are living in their passport country. Rather, some families may also be living abroad but in a separate country to where the IBT is working. These types of arrangements are typical among international non-governmental organization (NGOs) where, for safety and security reasons, the entire family relocates internationally to a designated 'safe country' from which the employee then engages in brief assignments to their place of work, which is typically considered too dangerous for their dependents to live in. In a similar vein, business expatriates (such as AEs) often engage in similar work arrangements when they undertake regional roles. In Asia, for example, it is common for AEs to relocate with their families to Singapore or Hong Kong and then to engage in frequent business travel, of between three days and two weeks duration, within the Asia Pacific region as a required function of their role. Although these latter types of work engagements remain as yet unexplored in the IBT population, we refer to them as 'IBT expatriates' and 'expatriate IBTs', respectively. For the purposes of this chapter, we do not include them in our review and analysis, but flag them here as an important segment of the IBT workforce requiring future study.

When we refer to international commuters we mean employees who retain a permanent residence status in their home country but work unaccompanied (by family members) on a semi-permanent to permanent basis of between two and three years in another country, and who return home at frequent intervals (Deloitte, 2013; Scullion and Brewster, 2001). International commuters might also do some of their work in their home country (Briscoe and Schuler, 2004), given that they have been most commonly conceptualized as employees with work responsibilities in two countries (Deloitte, 2013). International commuters in the business community typically travel from home to their country of work on a weekly, bi-weekly or three-weekly basis (Dowling and Welch, 2004), and in other communities such as oil and gas would travel to their country of work on a monthly or rotational basis (for example, 30 days on, 30 days off for oil rig or shipping employees) (Baker and Ciuk, 2015; Danehl, 2015). Compared to IBTs, the main difference relates to the destinations of the trips; specifically, IBTs typically travel to several different destinations, whereas the commuter's travel destination is always the same. It is also likely that the number of trips per year may be higher among commuters than among IBTs. International commuting is on the rise, with the majority (64 per cent) of the 63 companies surveyed in a recent Deloitte (2013) study reporting an increase. KPMG (2015b) found similar results among Swiss headquartered companies with a 42 per cent increase in international commuter activity over a seven-year period (from 8 per cent of companies in 2009, to 50 per cent in 2015). The precise increase is however unclear, given that many multinational enterprises

(MNEs) do not provide formal and central mobility oversight for tracking commuting arrangements. EY (2016) found, for example, that only 35 per cent of organizations have a commuter assignment policy in place, while only 5 per cent use rotational policies. Notably, as for IBTs, some international commuters also ‘commute’ from a nominated home location that is not their passport country. In the case of the mining industry, it is common for entire families to relocate from, say, South Africa to Australia (Perth, Brisbane, Sydney, Melbourne) and for the employee to then commute to their place of work in a typically ‘hardship’ mining location within Australia, while leaving their family in a ‘soft’ location (Beach et al., 2003; Dickie and Dwyer, 2011; KPMG, 2015c). These ‘expatriate commuters’ also require further study.

It has been said that international assignments lasting less than one year are typically categorized as short-term (Harris, 2002; Tahvanainen et al., 2005; Tahvanainen, 2003), and in most cases assignments will be even shorter (that is, up to only six months duration) (Brookfield Global Relocation Services, 2015; KPMG, 2011; Suutari et al., 2013). Essentially, short-term assignees stay in their host country for longer than the duration of an international business trip, yet for a period shorter than a typical long-term international assignment (of between two and five years), usually from three months up to one year (Mayerhofer et al., 2004; ORC Worldwide, 2006, 2008; Shaffer et al., 2012).

Organizations need flexible options to allocate their critical human resources in a global setting in order to develop and maintain their competitive advantage (AirInc, 2012; Brookfield Global Relocation Services, 2009; Collings et al., 2007). Together with these organizational needs, easier and cheaper travel and improvements in communications technology have increased the ease with which these three types of employees can be utilized by MNEs over the past 15 years (ORC Worldwide, 2003; PricewaterhouseCoopers, 2001; Wong, 1999). In this chapter, we begin by providing an overview as to what is currently known about the challenges of using IBTs, short-term assignees and international commuters, as well as the advantages that these methods of work offer to MNEs and employees. We note here that there are only a few published studies in extant academic literature, thus we broaden our literature review to also include relevant industry articles, white papers and consulting reports. In the section that then follows, we outline new empirical evidence relating to each type of international employee, including an emerging and significant issue in relation to tax compliance for these three types of employees. We conclude with a discussion of future research topics, as well as outlining practical implications.

CURRENT STATUS: WHAT DO WE KNOW?

International Business Travellers

Using IBT employees instead of long-term expatriates is attractive to MNEs owing to the cost savings and the flexibility these types of employees offer them. Unlike long-term expatriates, IBTs are not bound to any one place, but can work flexibly in a number of locations and cultures (Harvey et al., 2010). Although technical advances permit communication without physical attendance, mobile workers are still needed, and face-to-face encounters are important in the creation of personal business relationships and trust

among key players (Davidson and Cope, 2003; Faulconbridge and Beaverstock, 2008). In some areas, especially in politically unstable countries and regions, using IBTs instead of expatriates may also be an appropriate response to issues around employee safety (Welch and Worm, 2006).

Work involving a great deal of mobility has both costs and benefits for the individual. Travelling itself may cause stress and strain (Westman et al., 2004). Compared to domestic travel, travelling internationally is more of a strain both physically and mentally, and has more impact on other areas of life (Baker and Ciuk, 2015; Shaffer et al., 2012). The degree of travel-related stress experienced depends on diverse factors such as the traveller's marital status, family situation and personal factors, for instance age and physical condition. For example, combining work with travel and other areas of life may be more challenging for IBTs with children than it is for their colleagues without children (Espino et al., 2002; Mäkelä et al., 2015). In addition, the impact of travel on physical health can be dependent on personal factors, such as age, so older employees who travel internationally may find coping with the effects of jet lag more difficult (Stahl and Björkman, 2006). How people experience work with international travel can to some extent vary by gender (Gustafson, 2006; Kollinger-Santer and Fischlmayr, 2013; Mäkelä et al., 2015; Westman et al., 2008). Several studies suggest that female IBTs find travel more challenging than their male counterparts, which may be caused by traditional gender roles (in general) that make it easier for men to delegate domestic responsibilities to their partners when they are travelling (Frone et al., 1992; Fischlmayr and Puchmüller, 2016; Kollinger-Santer and Fischlmayr, 2013).

Research on business travellers that has looked at their health risks has mainly been conducted within the field of travel medicine. Research conducted with IBTs has reported travel-related physical illnesses, such as infections and gastrointestinal disorders (Liese et al., 1997; Patel, 2011); psychological disorders related to sleeping, eating and alcoholism (Burkholder et al., 2010; DeFrank et al., 2000; Mäkelä et al., 2013); as well as other psychological challenges such as travel-related stress, depression, anxiety, job exhaustion and burnout (Mäkelä and Kinnunen, 2015; Patel, 2011; Striker et al., 2000; Striker et al., 1999; Westman and Etzion, 2004).

In extant literature, international work-related travel is mostly seen as a source of stress both to the traveller (DeFrank et al., 2000; Gustafson, 2014; Ivancevich et al., 2003; Ramsey et al., 2011) and to their family (Baker and Ciuk, 2015; Bergbom et al., 2011; Mäkelä et al., 2012; Mäkelä et al., 2014; Nicholas and McDowall, 2012; Westman et al., 2004). Research on the positive effects of travel is scant, although there is some evidence (e.g., Mäkelä et al., 2014; Mäkelä and Kinnunen, 2015; Westman and Etzion, 2002; Westman et al., 2009a). For example, some researchers refer to travel as a source of personal and occupational development, variety and novelty (Stahl and Björkman, 2006; Westman et al., 2009b). Conversely, regular absences from home add an irregularity to life, and IBTs may find it difficult to maintain relationships and a healthy lifestyle (Harvey et al., 2010), particularly in the host location where they may be living alone in temporary accommodation and, due to frequent trips home, may not have the opportunity to establish social networks and non-work support in the country or city where they spend the majority of their working week (Starr and Currie, 2009). On the whole, the success of travelling or commuting for international work depends greatly on personal and family factors (Baker and Ciuk, 2015; Gustafson, 2014; Mayerhofer et al., 2011), and although

IBTs' families do not relocate as the families of long-term expatriates do, there are still effects at the family level (Bergbom et al., 2011; Gustafson, 2012; Harvey et al., 2010; Mäkelä and Suutari, 2011; Mäkelä et al., 2012). Employees with families, for instance, have been found to be less willing to travel for work than those who live alone (Gustafson, 2006; Roehling and Bultman, 2002). Work requiring travel abroad requires extra effort from the traveller to maintain work–family balance (Baker and Ciuk, 2015; Copeland, 2009b), and also demands flexibility and cooperation from the stay-at-home partner, who is likely to face an increase in the volume of domestic chores and responsibilities during the partner's absence (Copeland, 2009a; McNulty, 2015).

Supportive human resources (HR) practices for international employees are for the most part targeted at longer-term expatriates, thus support available for IBTs can be very limited (Baker and Ciuk, 2015; Harvey et al., 2010). For example, although it is known that travel puts a strain on physical and mental health, it is unusual for health and well-being to be monitored. Similarly, IBTs do not usually receive cross-cultural training, although it would be beneficial since they might work in several cultures in the course of a year. It is possible that one reason for the lack of support is that HR staff have no (or limited) personal experience and knowledge of the stresses and strains of regular international travel (Stahl and Björkman, 2006). The level of organizational support available can also be dependent on the size of the organization: a smaller firm can have fewer resources available for traveller support than a large multinational (Stahl and Björkman, 2006). Offering supportive HR practices to travellers (that is, safe and efficient travel arrangements and an opportunity for post-travel recovery) could be beneficial for organizations, since such practices have been found to be related to the employee's vigour and satisfaction with work involving travelling (Beaverstock et al., 2010; Mäkelä and Kinnunen, 2015).

As mentioned above, individual characteristics are associated with how a person experiences international work travel. Prior research has stated that employees who have an international career orientation or a global mindset (that is, who are open to and aware of cultural diversity, and able to handle it) are more willing to travel internationally (Kedia and Mukherji, 1999; Mäkelä et al., 2014; Phillips et al., 2014). Therefore, it would be beneficial to recruit applicants who are willing to travel and are aware that the position they are applying for requires international travel. A dilemma, of course, is that as there are an increasing number of positions in which travel is not optional, rejecting a position that involves travel can be a career risk (Shaffer et al., 2012), and so it follows that some employees who are unwilling to travel will still accept positions that require it.

International Commuters

International commuters live in one country but work predominantly in another (Scullion and Brewster, 2001), travelling between the two on a regular basis, and generally with the support of the employer by being asked or expected to go as part of their role responsibilities (Deloitte, 2013; ECA International, 2012). Much like domestic commuters (Anderson and Spruill, 1993), travelling is an essential part of international commuters' lives as they travel to their country of work and typically return home at the end of each week or every second weekend (Brewster et al., 2001; Dowling and Welch, 2004; Harris, 2002). Some commuters might also undertake aspects of their work in the nominated home country location (Briscoe and Schuler, 2004). There are very few

empirical studies focusing specifically on international commuters, and those that have been published are often descriptive and only very recent (e.g., ECA International, 2012; EY, 2016); thus we do not know as much about this type of employee as we would like, other than what can be gleaned and adapted from a well-established stream of research on domestic (home country) commuting (e.g., Anderson and Spruill, 1993; Bunker et al., 1992; Gerstel and Gross, 1987; Sandow, 2014) or handbooks within specific industries (Ranford et al., 2012).²

Extant literature shows that employees become international commuters for three main reasons, which can be categorized as personal, practical and professional: (1) the employee is asked to work in another location by an employer but because they and their family do not wish to leave the home country, international commuting is seen as a solution that causes less disruption to the lives of the employee's family members than would relocation; this includes that often (but not always) the geographical distance between the two proposed locations is seen as short enough that commuting makes more sense than actual relocation (Deloitte, 2013; Green et al., 1999; Harris, 2002; Huber and Nowotny, 2013); (2) they self-initiate international commuting to find employment that might not be available in their home country (McNulty, 2015); and/or (3) an employee's role spans two or more locations, resulting in international commuting becoming essential in order for the MNE to meet its business objectives (Deloitte, 2013). Engaging in international commuting means that the employee is still able to experience working in a foreign country without needing to fully integrate into its culture, nor to give up their everyday life in the home country. Travelling is nonetheless an inevitable part of international commuters' lives and it is likely that they face many of the same problems as IBTs, such as stress, fatigue and conflict between work and family, as do their families and stay-at-home partners (see McNulty, 2015).

Organizations use international commuters for the same reasons as they would use any other type of internationally mobile employee, that is, for skills and knowledge transfer, managerial control, project work and management development (EY, 2016; Konopaske et al., 2009; Peltonen, 2001). However, international commuters are perceived to be a cheaper option for organizations than longer-term expatriates, since the employer does not need to pay the higher costs of relocation such as school fees for children and housing, even though organizations do still incur the international commuter's travel and accommodation costs. Notably, this may be why young, educated males are the most common group of international commuters (Huber and Nowotny, 2013). Like IBTs, international commuting gives rise to some work-related problems, for instance, commuters in managerial roles can find it challenging to convince a host location employer of their commitment to the role or organization if they do not live in the same country and appear to rush home at every opportunity (even if this perception is untrue).

It is important to note that not all international commuters are supported by their employer; that is, while many international commuters are asked to go by the employer, there is an increasing number who self-initiate to work outside of their home country

² This is not to suggest that international commuters have not been studied. Rather, it could be the case that they are included in broader studies of 'expatriates' but not identified as such, or specifically studied as a separate employee group (see Chapters 2 and 20 of this volume for further discussion about methodological issues in relation to the research design of expatriate studies).

and cross national borders regularly for their work (Huber and Nowotny, 2013; Huber, 2014). For example, self-initiated international commuters are relatively commonplace in regions of Europe where millions of people live within a short distance of one or more national borders and have the legal right to work across those borders (for example, Belgians working in the Netherlands, and Spanish nationals working in France). Thus, a short distance between densely populated cities often facilitates mobility between countries (Huber and Nowotny, 2013; Huber, 2014). Additionally, cross-border commuting, particularly by self-initiated commuters, often arises due to large differences in available income levels between the home country and the country of work (for example, as is common with Malaysians working in Singapore). This can be especially prevalent among the unskilled workforce (domestic helpers, construction workers) who commute daily, weekly or monthly from an emerging to a developing economy in order to earn a living. It has been suggested that international commuting is not, then, only a question of organizational policies and practices, but that governments wishing to see their countries benefit from cheap labour have a responsibility to assist international commuters through, for instance, investments in transport systems to reduce travel times, and by reducing tolls on highways and bridges (Huber, 2014; Knowles and Matthiessen, 2009). Additionally, the integration of legislation affecting cross-border labour markets offers people (particularly self-initiated individuals) the opportunity to become international commuters (Huber, 2014; Knowles and Matthiessen, 2009).

Short-Term Assignees

Short-term assignees living outside their home country because of their work typically do so for a period of three months and up to one year (Collings et al., 2007; KPMG, 2015a, 2015b; ORC Worldwide, 2008; Tahvanainen et al., 2005), which is much longer than the period IBTs are away from home in any one stint, and generally shorter than the (total) time period international commuters are typically away from their home country. There is compelling evidence that of the three types of international employees explored in this chapter, short-term assignees are the most common type that MNEs might use to meet their business objectives (Collings et al., 2007; Cummins, 1999; Fenwick, 2004; Mayrhofer et al., 2008; Minbaeva and Michailova, 2004). KPMG (2015a) reports, for example, that among 600 global firms surveyed, 81 per cent offer short-term assignments (compared to 26 per cent offering international commuter assignments), and that among Swiss headquartered companies (KPMG, 2015b) all of them (100 per cent) have a short-term assignment policy; whereas only 85 per cent and 52 per cent, respectively, have a long-term assignment or an international commuter policy. Similar findings are evident in other surveys (Brookfield Global Relocation Services, 2015; EY, 2016; ORC Worldwide, 2003, 2006). In terms of prevailing trends, academic studies suggest the opposite to the above: that is, that there are fewer short-term assignment policies in place (Bonache et al., 2010), and more taxation and social security regulations that must be dealt with by the individual rather than the company (Suutari et al., 2013), with less HR support for organizing assignment-related documentation (Brewster et al., 2001). Still, industry reports provide a somewhat clear picture that short-term assignments appear to be well managed, are extremely common, and that companies will continue to use them in the future (Brookfield Global Relocation Services, 2011; EY, 2016; ORC Worldwide, 2006,

2008; Salt and Wood, 2012). Nonetheless, more empirical research is needed regarding the use of short-term assignments in MNEs across different industrial sectors or geographical areas, given that the comprehensive reports by ORC Worldwide (2006, 2008) have unfortunately not been updated since publication.

One of the key differences of short-term assignees compared to IBTs and international commuters is that they may in some instances relocate with their family, that is, relocate accompanied rather than unaccompanied. While not common, this sometimes occurs when a short-term assignment is between six and 12 months duration (or unexpectedly extended beyond the agreed-upon time frame; ORC Worldwide, 2006) and the geographical distance between the home and host country is long (KPMG, 2015a). Typically, though, short-term assignees leave their families at home just as IBTs and international commuters do. This has both negative and positive effects for all three types of international employee. Being separated from family members as well as relatives and friends is stressful, both for the traveller and for the spouse and children at home (Copeland, 2009a, 2009b; Dowling and Welch, 2004; Peetz and Murray, 2011; Starr, 2009), with a number of self-help books recently emerging to address their issues (e.g., Ranford et al., 2012; Weston, 2007). New technologies (Skype, WhatsApp, Facebook) have certainly helped to alleviate the stress.

Empirical research, though scarce, has provided important insights into the experiences of family separation and the work–family interface among the three types of employees explored in this chapter. Morrice et al.'s (1985) early work on 'intermittent husband syndrome' found that work-induced separation places a psychological strain on left-at-home family members (particularly spouses), resulting in anxiety and depression (see also Sutherland and Flin, 1989). In a recent ground-breaking study of 68 at-home spouses of people who were on, or had recently been on, a short-term assignment or extended business trip (that is, IBTs), Copeland (2009a) found that when organizations do not address additional financial costs (for example, child care) arising from the employed spouse's absence, and when couples feel coerced into accepting these types of international work assignments, there are more negative outcomes for the families involved, including children with more behavioural problems, and the at-home spouse being more depressed and more likely to consider divorce. In contrast, Copeland found that when both spouses feel that they are 'in this together' (p. 30), the respondents have more positive feelings about their marriage. Other factors found to contribute to marital and overall life satisfaction include when the travelling spouse does more housework when home, when levels of worry about safety (at home) are lower, when the fundamental marital relationship and way of parenting is unchanged, and when the at-home spouse realizes potential benefits arising from the absence of their spouse (for example, increases in family income).

Another key difference in comparison to IBTs and international commuters is that short-term assignees typically do not travel home as often. ORC Worldwide (2006) reported that on average, among more than 500 MNEs surveyed, the majority of companies (62 per cent) impose a 'length criterion' before an assignee is eligible for home leave benefits, with the majority needing to wait three months or more before going home for the first time. Additionally, 30 per cent of Asian companies surveyed (compared to 18 per cent globally) impose a further condition that a business trip to the home country counts as home leave, thus short-term assignees are not able to 'double dip'. Fortunately, 84 per cent of companies reimburse assignees for home leave trips in one form or another

via expense claims, travel vouchers or lump sums (with only 16 per cent providing no home leave allowance at all), and more than 50 per cent allow assignees to bring their family to the host location in lieu of home leave and reimburse the costs in full. Notably, these data were collected more than a decade ago; however, as there are few empirical studies conducted since this time, we can only speculate whether the policy conditions for short-term assignees have improved or become more onerous (Suutari et al., 2013; Suutari and Brewster, 2009).

Short-term assignees are especially valuable in organizations that conduct project-based work (Suutari et al., 2013; Dowling and Welch, 2004), this being the top reason why they are used (EY, 2016; ORC Worldwide, 2006). This is because they can often be recruited externally (and generally do not require ongoing employment after the project is completed), and as they generally do not relocate with their families they are committed to working long hours (Starr and Currie, 2009). There are other reasons for short-term assignments besides project work. For instance, an MNE might identify an urgent need to build social networks and facilitate the exchange of knowledge in its foreign subsidiaries. Top management may then move there for a short time and undertake a boundary-spanning role, particularly if a longer stay abroad (as an AE) is not possible or practical (Tushman and Scanlan, 2005). To a lesser extent, short-term assignees can also be used to support management development (Peltonen, 2001), to build new international markets (Salt and Millar, 2006), to staff start-ups and to deploy key personnel to hardship, emerging or unsafe locations for which a long-term assignment would be impactful (ORC Worldwide, 2006). This type of assignment can further facilitate access to specialized talent that is not readily available in a host location (Hocking et al., 2004; Minbaeva and Michailova, 2004), and to bring specialized host location knowledge to headquarters via inpatriation (Reiche et al., 2009; see Chapter 11 of this *Research Handbook*).

While short-term assignees are beneficial for companies, there are many advantages for the assignees themselves; assignment objectives are usually more clearly defined compared to long-term assignments (Tahvanainen et al., 2005); living and working abroad offers them an opportunity to develop their work-related knowledge and to improve their language skills without making a long-term commitment to be away from their home country (Suutari et al., 2013); and it generally improves an individual's income through incentives and bonuses (Starr and Currie, 2009). Working abroad may also boost short-term assignees' career and social capital (Dickmann and Doherty, 2008) and thus enhance their long-term employability (Suutari and Brewster, 2009).

Short-term assignees are often required to make the decision to accept the assignment at short notice, rarely having the opportunity to visit the location or to attend cross-cultural training prior to starting, despite that they will likely face many of the same cultural and everyday issues as those who undertake long-term assignments (Suutari and Brewster, 2009). This often results in cultural and linguistic challenges (KPMG, 2015c).

NEW EMPIRICAL EVIDENCE

In this chapter so far, we have provided an overview of the current status of extant literature on IBTs, short-term assignees and international commuters. As shown, most data about this topic stem from industry and consulting reports or academic

conceptualizations, with only a handful of empirical studies available. In this section, we build on the limited extant literature by reporting the findings of a very recent empirical study conducted by the first two authors, comparing differences and similarities among IBTs and international commuters.

IBTs and International Commuters: Do They Differ From Each Other?

The study was conducted in Finland in 2011 with a central research question:

RQ1: Do IBTs and international commuters differ from each other, and if so, in what ways?

Using data from a larger study of 232 employees who had made at least one international business trip in the preceding 12 months, for the purposes of the analysis presented here we excluded those respondents who had made fewer than six international business trips in the preceding 12 months. In other words, we reduced data to those who, on average, travelled at least once every second month, which we took to mean that these individuals were in jobs that required extensive travelling. The resulting dataset was 164 employees of which we divided the respondents into two groups: those who mainly travelled to the same destination, that is, international commuters ($n = 71$); and those who mainly travelled to different destinations, that is, IBTs ($n = 93$). We conducted a series of chi-square tests and t-tests to reveal the differences between IBTs and international commuters.

Background variables

Our sample was male-dominated: 38 of respondents were women (55 per cent international commuters, 45 per cent IBTs) and 124 were men (40 per cent international commuters, 60 per cent IBTs); two respondents chose not to reveal their gender. The difference in division of IBTs and international commuters between men and women was almost statistically significant ($p = 0.89$), with the age difference being statistically significant ($p < 0.5$). IBTs were older (ranging from 27 to 64 years, with a mean age of 43.7) than international commuters (ranging from 25 to 55 years, with a mean age of 40.7). There were no statistical differences in terms of marital or relationship status, with most of the respondents (92 per cent) in a relationship. The majority of the sample (74 per cent) had children with no statistical difference in parental status between either cohort.

Travel patterns

In the preceding 12-month period, IBTs' time spent travelling abroad varied between ten and 200 days (mean = 63.4 days) with the average trip lasting 4.7 days. International commuters spent between ten and 320 days travelling abroad (mean = 77.5 days) with trips lasting, on average, for 7.5 days. No statistically significant difference was found between IBTs and international commuters in terms of total time abroad or average trip length. In terms of destination, 71 per cent of all respondents travelled mainly within Europe, whereas 29 per cent travelled outside Europe. Of those who travelled mainly within Europe 52 per cent were IBTs and 48 per cent were international commuters. However, a statistically significant difference was found in travel destinations between IBTs and international commuters, with 67 per cent of IBTs travelling more often to non-European destinations.

Job demands

The authors focused on two types of job demands related to work travel: workload and work pressure, and the specific risks of travel destinations (see Mäkelä and Kinnunen, 2015). Workload and pressure related to international business travel illustrated the general quantitative demands and were measured with five items (for example, 'My work tasks while travelling abroad are challenging'). The six items measuring the risks of travel destinations attempted to capture more specific risks related to travelling (for example, 'Work trips abroad expose me to health risks'). All the items were scored on a five-point scale anchored with 'not at all' (1) and 'all the time' (5). The Cronbach's alpha for each scale was 0.77 and 0.84, respectively. We found that IBTs' and international commuters' experiences differed (and were statistically significantly at $p < 0.5$), with IBTs feeling both of these demands more acutely than international commuters: for workload and pressure related to international business travel (IBTs mean = 4.1, international commuters mean = 3.8); and for risks of travel destinations (IBTs mean = 3.2, international commuters mean = 2.6).

Benefits of work related travel

Two items were used to study the benefits provided by international business travel for the employer ('My work trips are important to my employer's success' and 'My international work trips enhance the development of networks beneficial to my employer'), and three further items to study benefits provided by international business travel for the employee (for example, 'My work trips enhance my professional development', with Cronbach alpha 0.70). Both cohorts perceived that their employers enjoyed greater benefits from their business travel (means: IBTs 4.5; international commuters 4.2) than the travellers themselves did (means: IBTs 3.7; international commuters 3.6), but that IBTs' employers received more benefits than did international commuters ($p < 0.5$). No statistical difference was found in the travellers' experiences of the benefits of travel for themselves.

HR support

In terms of the respondents' perceptions of HR practices supporting work travelling (Mäkelä and Kinnunen, 2015), a scale was used consisting of five items which were generated from earlier literature likely to be relevant to business travel (e.g., Ivancevich et al., 2003; Jensen, 2013; Welch and Worm, 2006). Items included 'My employer takes care that travel arrangements run smoothly', 'offers me the opportunity to travel comfortably', 'takes care of my safety', 'provides the necessary training and coaching' and 'offers me an opportunity for recovery after the trip.' The items were scored on a five-point scale anchored with 'totally disagree' (1) to 'totally agree' (5), with a Cronbach's alpha of 0.69. Both groups reported that HR support for travelling was at a moderate level, with no statistically significant difference between IBTs' and international commuters' experiences (means: IBTs 2.8; international commuters 3.0).

Burnout

Both IBTs and international commuters were relatively satisfied with their work, including the travelling they were required to do, with no evidence of a statistically significant difference between the groups on a six-item scale (mean 4.5). The level of their emotional

exhaustion (an essential element of burnout) was also moderate when measured on a six-item scale (mean 3.2).

Work and personal life

No difference was found between IBTs' and international commuters' experiences concerning work-to-personal life conflict or personal life-to-work conflict, and both groups suffered from moderate levels of conflict. In order to focus on family issues, two single items were studied. First, it was found that both IBTs and international commuters did not experience very strong work-to-family conflict, with moderate means of 3.4 and 3.3 respectively on a six-item scale, with no statistically significant difference (for example, 'I constantly have a bad conscience because I need to neglect my closest ones due to my work'). Second, it was found that IBTs experienced greater family-to-work conflict (mean = 2.8) than international commuters' (mean = 2.5) on a four-item scale ($p < 0.5$) (for example, 'My closest ones say I am sacrificing too much for my work').

The findings of this empirical study showed that international commuters travelled more often and were away from home longer than IBTs, yet IBTs felt their job demands more acutely in terms of workload, pressure and the risks associated with travel to certain destinations. The reduced amount of strain experienced by international commuters could be as a result of their travel to one destination and a single cultural context, whereas IBTs are required to cross multiple cultural boundaries and to adjust to several different environments. Furthermore, as international commuters travel more regularly, it is assumed that their travel can be pre-arranged, which would make it easier to maintain stability in their private life. Both groups felt moderate levels of burnout, and moderate levels of conflict between their work and personal life and vice versa. Both groups also felt that their employer benefited more from their work-related travel than they did themselves, with IBTs' employers perceived to benefit slightly more than international commuters. HR support for both groups was found to be moderately acceptable.

FUTURE STUDIES

Going forward, we still do not know enough about the work and work-to-family experiences of IBTs, international commuters and short-term assignees. As this is a growing segment of the international workforce, more empirical studies are needed to understand the wide variety of issues and opportunities that these types of employment pose for MNEs and employees themselves. This includes how MNEs' policies and practices can be improved to address specific work-family challenges (Dickie and Dwyer, 2011). Poorly designed and implemented HR practices can affect the retention of employees and lead to the loss of critical knowledge (Beach et al., 2003). It also requires careful management of the organization's duty of care for protecting employees assigned to dangerous locations, or those who find themselves in dangerous situations while working abroad (Claus, 2009).

One of the biggest problems to address with IBTs and international commuters in particular is that many MNEs, and particularly those with smaller populations of less than 100, still do not formally manage these forms of international work. As EY (2016, p. 15) notes in a recent survey:

Many organizations rely on people traveling for short periods across borders. These business trips can create risks around immigration, corporate, employment and individual taxes, depending upon the journey locations, length of visits and activities undertaken. These risks are regulatory, reputational and financial and can also damage the ability to do business in some regimes. Yet many employers cannot track where people are and what they are doing.

Especially lacking is centralized mobility oversight via a global mobility department with the knowledge and skills to deal with the complexities around personal income tax, payroll withholdings, social security, immigration, employment law and corporate tax (Deloitte, 2013; EY, 2015). This has led to a phenomenon known as ‘stealth expatriates’ (Cendant, 2005): employees that travel internationally for their work but who do not come under the remit of the MNE’s formal expatriate programme for the purposes of monitoring tax and immigration compliance. EY (2016) found that short-term business travellers in particular have the highest mobility risk rating in terms of income tax and social security reporting and withholding, immigration compliance and corporate tax. Stealth expatriates are almost always discovered by accident and usually when something goes wrong, that is, their guest worker status is exceeded from a tax standpoint and they are detained and prevented from boarding a flight home by the immigration authorities. Cendant (2005) found that a large majority (78 per cent) of the 216 international human resources management (IHRM) respondents in its global survey had experienced the stealth expatriate issue firsthand, with IBTs and short-term assignees being among the most common, followed by international commuters. Notably, 83 per cent did not have systems in place to track these types of employees. Danehl (2015, p. 1), in a recent report about rotators in the oil and gas industry, notes that:

In the past, nobody took responsibility for where – or even if – rotators paid tax. There have been no pension schemes, career advice or even help with acclimatization. In fact, the system seemed perfectly designed to keep them ‘off the books’ . . . Nobody takes responsibility for their tax affairs and it is often unclear where they should be paying tax. It’s a system that can leave them with a very big bill or even a legal problem in future.

EY (2015, 2016) found that while awareness among organizations of the risks generated by short-term international business travel is rising, it is predominantly driven by post-travel analysis from a tax perspective, thus leaving employees at risk of immigration and other employment law violations while they are already abroad. EY suggests that expense systems, travel agent reporting, turnstile data and employee-provided calendar information are important sources of data that can assist in the risk management process for these types of employees.

Stealth expatriates cause innumerable (and preventable) problems for MNEs. First, the increase in tax, social security and immigration compliance risk among these types of employees, both personally for the employee and in terms of exposure to prosecution for MNEs, can be significant. For international commuters, the risk has increased because MNEs increasingly do not place a limit on the geographical distance between the two countries over which the employee lives and works, thus they may be staying longer in a particular overseas location due to travel time (to avoid burnout from long travel distances, jet lag and adjustment to time zones) (Westman et al., 2004), which can create tax residency issues in the host location (Deloitte, 2013; EY, 2016). Other problems include

that when international commuting roles are not formally monitored, it can lead to these arrangements not being handled in a fair and consistent manner across all employees, for example where support for international commuting is only approved for business rather than personal reasons. Deloitte (2013) found that of the companies that formally manage commuters, nearly all (97 per cent) provide some form of tax preparation assistance, tax equalization (65 per cent) or tax protection (15 per cent), to assist with employees' dual tax liabilities across the home and host country. This differs according to whether the commuter assignment is undertaken for business versus personal reasons, with the latter receiving less MNE-sponsored tax support.

In addition to compliance, when these types of assignments are not formally managed, there are fewer controls in place as to how often an employee can return home at company expense, as well as how long the international work arrangement will last in total. When unmonitored, travel expenses can escalate unexpectedly if an international employee is returning home more frequently than anticipated, especially if the class of ticket is determined by the number of flight hours, for example, where business or first class fares can be booked, or if the work arrangement is extended for months or years beyond the original length of time intended. Cost containment can then become an issue, particularly if international commuting or a short-term assignment was intended to replace the expense of a long-term assignment (ORC Worldwide, 2006). This is especially an issue for short-term assignments of between six and 12 months duration as these employees are typically entitled to many of the same benefits as long-term assignees, for example, incentives, hardship bonuses, housing, transportation, relocation allowances and frequent trips home, as well as destination orientation, language training and cross-cultural training. From this perspective, restricting the length of time (and frequency of visits) employees can spend crossing back and forth on business trips is essential in order for employees to be compliant with all regulations.

Another area requiring future study is the motivation and selection of staff for IBT, short-term and international commuting work opportunities, which should be based at least in part on the person–job fit perspective; for instance, individuals with a strong career orientation toward international work may find any of these three roles more rewarding than an individual who ranks low in terms of international outlook. It would also be beneficial to map how well the different types of international work fit with the personal life situation of business travellers in general, as this knowledge could forestall negative effects on employees' work–life balance, which if compromised can adversely affect their performance at work. Conversely, more research is needed to focus on career capital development flowing from these types of international work experiences, and its outcomes, such as enhanced employee marketability within and across MNEs.

In addition to the above, more work is needed to determine the boundary conditions under which IBTs, short-term assignees and international commuters are designated as such. As mentioned in our introduction, new forms of IBT and international commuting arrangements are emerging, where the home country is not necessarily the passport country of the employee but instead another country where their family is residing. These new forms of work that encompass 'IBT expatriates', 'expatriate IBTs' and 'expatriate commuters' require further conceptualization and empirical study as the pool of global talent and their working arrangements continues to expand.

In conclusion, this chapter has provided an overview of extant literature regarding

three types of international employees: IBTs, short-term assignees and international commuters. All spend a considerable amount of their time outside their home country, but the time they spend abroad differs. All three also offer organizations flexible options to manage their international operations. We urge more research to be conducted on this important segment of the international workforce that we hope to see in the future.

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294 *Research handbook of expatriates*

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Index

- Abbe, A. 297, 305
Abrahams, R. 264, 266, 269
academic expatriates
 academics as expatriates 336–7
 aim and focus of study 335–6
 as minor theme in academic research 66–8,
 72–3, 502
 status of field
 career-related risks 336
 demographic characteristics 337–8
 experiences outside workplace 343–4
 motivations to relocate 338–9
 work outcomes 341–3
 workplace experiences 339–41
 theoretical development and further research
 344–5
academic–practitioner partnerships
 advantages 418–19
 collaboration
 future research directions 430, 432
 recommendations for 429
 typology of 429–31
 disadvantages 417–18
 eight-step process model of engagement
 commitment to rigorous data collection
 and analysis 422–3
 conducting research 425–6
 dissemination of research findings 427
 entering into formal contract or informal
 understanding 423–5
 establishing credibility, rapport and trust-
 building 420–21
 exploring different agendas and finding
 common interests 421–2
 long-term engagement 427–8
 writing of reports and help with
 implementation 426–7
 access, gaining 443–4
 acculturation
 factors influencing TCK expatriates’ 248–9
 of immigrants 86
 of inpatriates 223, 225, 232–3
 of LGBTI expatriates 209, 211–12
 role 86–7
 adaptation 456–7
 adjustment
 3-D model 84, 88–90, 99–100
 acculturation of immigrants 86
 antecedents of 90–93
 ‘assignment success’ 93–4
 challenges for inpatriates 221, 233
 cognitive, behavioural and affective
 dimensions 85–6
 consequences of 93–6
 as criteria of expatriate success 109
 cross-cultural 85–6, 109, 118, 120, 123, 127,
 250, 456, 472–3, 475–9
 dominant model in business research 87
 extant literature 91–3
 framework for understanding immigrant
 adjustment 86–7
 further research avenues 98–101, 107
 of global families 474–8, 483–4
 implications of knowledge
 current status 96
 expatriates 97
 families 97
 global mobility specialists 97–8
 local managers and colleagues 98
 researchers 98–101
 as largest theme in academic research 63–5,
 68–70, 73, 501
 link with distal outcomes 94–6
 of military family members 306–7
 as outcome of person–environment fit 87–8,
 95–6
 outcomes linking to identity 455–6, 461–2
 and performance 94–6, 99, 109, 116, 120–24,
 126–7, 153
 psychological and sociocultural adjustment
 87
 role of anxiety and cognitive uncertainty 85
 role of communication 141
 role of knowledge and behaviour 84–5
 success over time 94
 theories and research 83–90
 time issue 196–7
 work/job 84, 87–8, 342
Adler, N.J. 6, 32, 64–5, 68–9, 119, 135, 142,
 154, 242–9, 497, 514
adult MKs (AMKs) 326
adult third culture kids (ATCKs)
 in academic research articles 328
 adaptation outcomes 456–7
 adjustment levels 478
 as adult MKs 326

- creativity 458–9
 definition 454
 future research directions 461
 identity patterns 454–5
 interpersonal relations 457–8
 as theme in academic research 67, 72
 affective dimensions of adjustment 85–6
 Agergaard, S. 353–5, 359–61
 Agibi, F. 323, 330
 Aidland, expatriates in *see* humanitarian aid
 and development workers
 AirInc 37, 278
 Al Ariss, A. 22, 25, 35, 37–9, 56, 63, 136–7,
 142, 148–9, 187–8, 191, 350, 353, 393,
 396–7, 409–10, 483
 Ali, A. 476–7, 479
 Alpander, G. 6, 31
 Altman, Y. 26, 35, 136, 168–9, 245, 247–8,
 308
 Alvesson, M. 440, 445, 502
 American Psychological Association 203, 493
 Anagnos, G. 164, 170
 analytical generalizability 441–2, 446
 Anderson, B.A. 119, 255, 298, 319, 375, 385
 Anderson, E.A. 280–81
 Anderson, M.B. 173, 374
 Anderzen, I. 26, 505
 Andreason, A. 25, 41
 Andresen, M. 21–7, 29–30, 32–3, 35–8, 40–41,
 54, 56, 63, 187–8, 191, 193–4, 196–8,
 276–7, 335, 353, 393, 396, 409, 503
 Andrews, L.A. 325–9
 anticipatory adjustment 87
 anxiety, role in adjustment 85
 Apthorpe, R. 368, 373–4
 Arnetz, B. 26, 505
 Arp, F. 36, 55
 Arthur, M.B. 211, 268, 340, 505
 Arthur, W. 25, 107, 114, 119, 468
 Ashford, S.J. 511, 515
 Ashridge Business School 269, 271
 assigned expatriates (AEs)
 contrast with SIEs 192, 196–7
 defining 25, 29, 32–4, 54, 394
 freedom to choose location 187, 190
 regional roles 277
 within research methods comparison
 aim of study 393
 classification of 395
 conceptualization 394, 396, 400–402,
 409–10, 412
 data analysis 406, 408, 412
 data collection 404–7, 411–12
 present study 398–400
 recommendations 411–13
 research design 396–7, 402–3, 410–12
 theoretical perspectives 398
 assignments *see* international assignments
 Atchison, A. 514–15
 athletes *see* sports expatriates
 attitudes
 family outcomes 479
 global employee outcomes 475
 Austin, A.E. 337, 340–41
 Australian Army Training Team Vietnam
 (AATTV) 304
 Auton-Cuff, F. 454, 478–9
 Aycan, Z. 23, 27–8, 32, 41, 108–10, 306
 Baack, S.A. 95, 99, 153
 Bader, B. 161–2, 171–2, 468, 474–5
 Bagley, R.W. 327–8
 Baker, C. 40, 55, 276–7, 279–80, 480, 502
 Baker, J.C. 5–6, 31–2, 64
 Bale, J. 355–6
 Balkin, D. 25, 28
 Banai, M. 7, 24, 32, 55, 64, 108–9, 307
 Barker, G.G. 455–6
 Barley, S. 502, 505
 Barnett, S.T. 325, 328
 Bartunek, J.M. 416–17, 427, 502–3, 507
 Baruch, Y. 24–6, 33, 35, 40, 57, 63, 136, 138–9,
 143, 191, 373, 375, 380, 384, 396
 Batalova, J. 39, 56
 Bazerman, M.H. 164, 167, 503
 Beach, R. 278, 287
 Beaverstock, J.V. 39–40, 276–7, 279–80
 Bedeian, A.G. 490, 494, 498, 509, 511
 Beehr, T.A. xxii, 87, 91, 124
 Beeth, G. 5, 31
 Befus, D.R. 67, 316–17
 Begley, A. 37, 188
 behaviour
 role in adjustment 84–5
 theory of planned 140–41
 behavioural dimensions of adjustment 85–6
 Belcher, W.L. 490, 492
 Bell, J. 378–9, 382–3
 Benet-Martínez, V. 451–5, 460–61
 Bennett, M. 5, 31
 Bennett, W. 25, 107, 114, 119, 468
 Benson, J. 261, 265
 Bergbom, B. 279–80
 Bergdolt, F. 40, 276–7
 Bernstein, J. 162–3
 Berry, J.W. 4, 38, 83–4, 86, 232, 451–2, 456–7
 Bhanugopan, R. 136, 502
 Bhaskar-Shrinivas, P. xxii, 56, 87, 91–3, 108–9,
 119, 121, 127, 456, 461, 472
 Biao, X. 141, 143

- bicultural identities
 adaptation outcomes 456
 creativity 458–9
 cultural minds 460
 decision-making 459–60
 future research directions 461–2
 interpersonal relations 457–8
 rates of promotion 455
 and their management 452–3
- bicultural identity integration (BII) 453–4,
 456–60, 462
- Biemann, T. 21, 24–5, 32–3, 54, 188, 197
- Bikos, L.H. 316, 320, 325–6, 328–9, 478–9, 483
- Binetter, T. 34, 55
- Bird, A. 65, 460
- Björkman, I. 64, 67, 152, 156, 279–80
- Black, J.S. 3, 6, 31–2, 41, 63–5, 67–9, 73, 83–4,
 87–8, 91–2, 98, 108–9, 119, 124, 136–7,
 153–4, 342, 456, 468, 472, 477–8
- Blackman, D. 162–3
- Boddewyn, J. 5, 21
- Boerner, S. 468, 475, 484
- Bolino, M.C. 154, 194
- Bonache, J. 32, 56, 68–9, 107, 110, 137, 218,
 282
- Bonebright, D.A. 454, 478
- Bono, J. 24, 504
- Borici, A. 218, 222
- Borjas, G. 34, 38–9
- Borman, W.C. 110, 112–19
- Borrmann, W. 5, 31
- Bos-Bakx, M. 297, 305
- Bozkurt, Ö. 21, 34, 55, 276
- Bratsberg, B. 34, 38–9
- Brein, M. 6, 37
- Brewster, C. 25, 28, 30, 32, 35, 38–40, 54–6,
 63–4, 83, 88–90, 94, 97, 99, 106–8, 119,
 126, 137, 148–9, 151, 153–4, 156, 187, 202,
 242, 246, 248–9, 262, 268, 277, 280, 282,
 284, 350, 378–9, 397, 409–10, 445, 483,
 505
- Briscoe, D.R. 32–3, 38, 277, 280
- Britt, W.G. 327–8
- Brook, J. 378–9, 381–3
- Brookfield Global Relocation Services 33, 134,
 136, 138–9, 142, 148, 151, 154–5, 176, 202,
 218, 241–2, 250, 262–3, 268, 276, 278,
 282
- Brown, M. 261, 265
- Brush, D.H. 110, 114–15, 117–18
- Buckley, M.R. 65, 218–22, 339
- Budhwar, P. 95, 127
- Bull, J. 514–15
- burnout 279, 286–7, 321, 500, 502
- Bushong, L. 326, 328
- business as mission (BAM) missionaries
 definition 320
 forming strategic alliances 321
 as missionary expat-preneurs 321, 324–5
 in typology of missionary expatriates 323–5
- business expatriates
 categorizing international workers 24
 defining, and establishing theory-specific
 statement 27–31, 54
 distant data collection characterizing most
 studies 438
 vs expatriate academics 338
 in research literature 31–2
 assigned expatriates 32–4
 other types of expatriate 37–40
 self-initiated expatriates 34–7
 study aims and focus 21–2
 study conclusion 41
 terminological confusion 24–7
 type of work arrangement 277
- business travellers *see* international business
 travellers (IBTs)
- Button, S. 205, 211, 214
- Caligiuri, P.M. 32–3, 54, 64–5, 68, 83, 91, 95,
 107–10, 113–14, 116–24, 153, 242, 244–8,
 250, 305, 372, 460, 472, 474, 505
- Callahan, J. 206, 498, 503
- Camp, C.A. 326, 328
- Campbell, J.P. 107, 110–19, 125
- Campbell, R. 4, 31, 297, 305
- Cao, L. 187–8
- Caplan, R.D. 88, 96
- Cappellen, T. 24–5, 57
- Cappelli, P. 24, 150
- careers
 academic expatriates
 balancing career needs 343
 career literature 344
 career paths 340
 career-related risks 338–9
 anchors for LGBTI 211
 career-related decisions in in-patriate
 assignments 232
 as issue for SIE research 197
 as major theme in academic research 64–5,
 70–71, 501
 Millennials 272
 post-assignment in GTM 154–5
 sports expatriates 350–356
 spousal involvement in 436–8, 474
 women expatriates 241–2, 244, 247, 249–51,
 253–4
 women in academia 499
- Carpenter, M.A. 149, 509

- Carr, S.C. 136, 143, 316, 319, 321, 328
 Carraher, S.M. 140–41, 154
 Carter, T.F. 355–6
 Cartus Corporation 161, 276
 Cascio, W.F. 25, 94, 149, 244–5, 249
 case study research
 advantages
 engaging with contextual influences 437
 naturally occurring data 438–9
 theory building 439–41
 defining case studies 435
 future research opportunities 444–6
 managing and overcoming challenges
 demonstrating analytical generalizability 441–2
 demonstrating construct validity 442
 demonstrating internal validity 443
 demonstrating reliability 443
 gaining access 443–4
 strengths and criticism 434
 types of 435–7
 Castles, S. 38, 134, 138, 356
 Caulfield, N. 36–7, 353, 394, 505
 Cerdin, J.-L. 28, 33–6, 38–9, 56, 148–9, 151, 154–5, 187, 189–91, 196, 198, 228, 230, 306, 378–9, 394, 396, 409, 445, 506
 Chaminade, C. 133, 139
 Chaudhuri, S. 264, 267
 Chen, Y.-P. 106, 110, 232
 Cheng, C.-Y. 451, 453, 458, 461–2
 Cheng, J.L. 6–7, 32, 64, 67, 379, 505
 Cheung, I.L.W. 326, 328
 children and minors as sports expatriates 362
 China
 Chinese expatriates
 Chinese-American 454, 458–9
 as minor theme in academic research 66–8, 71–2, 502
 women 246, 254
 expatriates in
 adjustment 501
 as major theme in academic research 63–5, 68, 70, 501
 motivation to relocate 338–9
 Cho, K.J.H. 327–8, 330
 Christensen, C. 138, 306
 Christensen, D. 323–4, 328
 Christianity as mission-sending religion 317–18
 Christiansen, N.D. xxii, 87, 91, 124
 Chrobot-Mason, D. 208, 214
 Chu, P. 24, 64, 468, 474, 483
 Church, A.T. 37, 83, 91
 CIES Football Observatory 351, 353
 Ciuk, S. 40, 55, 276–7, 279–80, 480, 502
 Clark, V.L.P. 426, 504
 Claus, L. 95, 126, 160–62, 167, 172–3, 175, 287, 385
 Cleveland, H. 5, 22, 61–2
 Cloutier, C. 495, 508
 co-authors 506–8
 Coe, N.M. 177, 358
 cognitive dimensions of adjustment 85–6
 ‘cognitive pillar’ 252
 cognitive uncertainty, role in adjustment 85
 Cohen, D.J. 416, 503
 Cohen, E. 6, 22, 31, 56, 99
 Cole, N.D. 141–2, 244–6, 250, 474, 477, 483–5
 Colic-Peisker, V. 39, 56
 Collings, D.G. 7, 21, 23, 25–6, 28, 33, 57, 63, 107, 148–54, 189, 222–3, 226, 231, 233, 276–8, 282, 468, 470, 479–80, 501
 Collins, D. 202, 213
 Collins, J.C. 202, 206
 Collins, M. 263–7
 Colquitt, J. 501, 506
 Comay, Y. 32, 34, 38
 commitment/allegiance
 affective 95, 123, 473, 475
 factors affecting 125, 153–4, 222, 226
 family 241, 247, 249–51, 474–5
 as indicator of adjustment 109
 to missionary work 322, 324, 327
 organizational 94–5, 109, 115, 117–18, 300–301, 340–41
 to rigorous data collection and analysis 422–3
 as theme in academic research 67–8
 commodity chains 356–8
 commuters *see* international commuters
 company-assigned expatriates (CAEs) 26, 32, 190
 compensation and benefits 26, 64, 68, 70, 513, 516
 competencies
 communication 85–6
 cultural 86–7, 297, 301
 developing in patriate 223, 229
 learning 270
 military expatriates 303, 305
 Millennial expatriates 261, 266–7, 271
 and personal initiative 193–5
 technical 116, 212, 267, 270
 Connelly, R. 492, 499
 construct validity 24, 442, 504
 Contu, A. 374–5
 Conway, J.M. 114, 119, 504
 Cook, P. 378–9, 381–3
 Cooke, F.L. 244–6
 Coombs, W.T. 162–3
 coordination and control 140, 143–4

- Copeland, A. 280, 283, 478
 coping strategies 67, 210, 339, 480
 Corby, J.E. 327–8
 Cousineau, A.E. 327–9
 Crandall, W. 162–4
 creativity 458–9
 Creswell, J.W. 426, 504
 Crewe, E. 374, 380
 crisis management
 case studies
 living through evacuation 178–9
 providing psychological support to expatriates 169
 current status of research 162
 defining crisis 161–2
 examples of recent crises 160
 external risk ratings and escalation hierarchy
 examples
 country-level risk rating 167
 evaluating external environment 166
 evaluating responses to emerging crisis events 166
 incident-level risk rating 168
 frameworks for understanding crisis
 response
 during crisis 163–5
 example policy framework overview 164
 post-crisis 163, 166–7
 pre-crisis 163–4
 temporal approach 162
 future research directions
 ‘commitment’ systems 175
 comparison of firms employing different configuration 175–6
 ‘control-oriented’ approach 174–5
 global production networks 177
 good practices and high-performance work systems 176
 knowledge management and organizational learning 176–7
 theories recognizing open systems perspective 176
 useful studies 174
 incident reporting overview 169
 individuals’ lived experiences, focus on 177–9
 organizational responses to crises and moderators of threats
 destinations believed to present dangers to expatriates 172–3
 sectoral differences in attitudes to expatriate well-being 173–4
 tensions in operationalizing policies 174
 types of crises believed to affect expatriates 171–2
 sectoral differences in attitudes to 173–4
 tensions in operationalizing policies 174
 theoretical perspectives on 167–71
 cross-cultural adjustment
 as criteria of expatriate success 120
 as critical for functioning effectively in foreign cultures 456
 future research direction 127
 as predictor of performance 109, 123
 of spouse 479
 support networks for 250
 traditional global employees and traditional family structures
 family outcomes 475–8
 global employee outcomes 472–3
 transformation process 85–6
 types of 118
 cross-cultural training 64–5, 67–8, 70, 501
 Croucher, R. 490, 492
 Crowley-Henry, M. 35, 38, 189, 263–7, 271, 300, 350, 378–9, 393, 396–7, 409–10
 Crowther, F. 4, 31
 cultural identities
 cultural minds 460–61
 defining 451–2
 future research directions and implications 461–2
 identity as motivator for cognition, affect and behaviour 451
 individual differences in
 bicultural identities and their management 452–3
 third cultures 454–5
 outcomes of different types of
 adaptation 456–7
 creativity 458–9
 decision-making 459–60
 interpersonal relations 457–8
 linking identity with adjustment 455–6
 cultural intelligence 64, 68–71, 451–2
 Cummings, L.L. 490, 495
 Currie, G. 33, 279, 284, 479, 481–2
 Czinkota, M.R. 162, 502

 Dabic, M. 69, 110, 393, 398, 410
 Daft, R. 495, 503, 516
 Dahlgren, A.L. 298, 321
 Danehl, J. 40, 55, 277, 288
 dangerous locations 166–7, 172–3, 210, 213–14, 287, 304, 310
 Daniels, J. 5–7, 26, 32
 Darby, P. 353, 356–8
 David, K. 6, 37
 Davies, S. 468, 472
 Davis, G.F. 92, 498
 Davis, P.S. 326, 328

- Davoine, E. 244–6, 250, 503
 Dawis, R.V. 84, 87–8
 Day, D.V. 64, 116, 124
 Day, N.E. 490, 495, 497, 515, 517
 De Cieri, H. 54–6, 64, 119, 148, 152–4, 156, 230, 276, 343, 375, 468, 476–9, 484
 de Guttry, A. 173
 De Rond, M. 497–8
 De Waal, A. 373–4
 Deadrick, D.L. 416, 427
 decision-making 459–60
 Defense Manpower Data Center (DMDC) 299, 308
 Deloitte 261, 264, 266–7, 276–7, 280–81, 288–9
 Demego, M. 262, 264, 266
 Demel, B. 40, 55, 276, 480
 DeNisi, A.S. 55, 98, 236
 Denning, P.J. 497–8
 Department of Defense (DoD) 300, 302, 305–7, 309
 Department of the Army (DoA) 298, 300–301
 developed and developing countries
 development terminology 134–5
 differences between 135
 foreign direct investment (FDI) 133–4
 future research directions
 coordination and control 143–4
 expatriate challenges 143
 motivation to expatriate 142
 self-initiated expatriates 142
 single-task expatriates 142–3
 talent flows and knowledge transfer 143
 lessons from literature
 coordination and control 140
 expatriate challenges 138–9
 motivation to expatriate 136–7
 self-initiated expatriates 137
 single-task expatriates 137–8
 talent flows and knowledge transfer 139–40
 study conclusion 144
 theory of planned behaviour 140–41
 women expatriates from 254–5
 Devich-Navarro, M. 451, 453
 Dewaele, J. 454, 457, 478
 Dicken, P. 177, 357
 Dickie, C. 278, 287
 Dickmann, M. 23, 25, 28, 33–5, 54, 136, 148, 151, 154–5, 189, 197, 284, 378–9, 432
 Digh Howard, P. 162–3, 177
 Dilley, A.P. 318–19
 discrimination
 female expatriates 142, 248
 LGBTI expatriates 205–7, 249, 309
 women in academia 499
 diversity
 and inpatriates 220–21, 237
 policy and LGBTIs 208, 214
 women expatriates from developing countries 254–5
 Doherty, N. 25, 28, 32, 35, 54, 56, 148, 154, 189, 197–8, 284, 353, 378–9, 393–4, 396, 409
 Dolles, H. 359–60, 363
 Donoghue, J. 4, 31, 61, 328–9, 454
 ‘don’t ask, don’t tell’ (DADT) policy 309
 Dorsch, M. 35, 189, 196–7, 393
 Doty, D.H. 25, 99
 Dowling, P.J. 115, 138, 143, 151, 230, 277, 280, 283–4, 477, 501
 Driscoll, M. 205, 210, 214
 dual-career couples
 challenges 249
 IBTs 480–481
 lesbian and gay expatriates 204
 as minor theme in academic research 67–8
 Western women in 251, 253, 255
 Dumont, J.-C. 23, 136
 Dunning, J. 4, 31, 505
 duplicity (being in or out) 203, 207–10, 213–14
 Dupuis, M.-J. 242, 244–5, 249
 duty of care 161, 170, 210, 214, 287
 Duxbury, L. 434–7, 440–41
 Dwyer, J. 278, 287
 Eade, D. 374, 377
 Earley, P.C. 64, 451
 ECA International 280–81
 Edmondson, A.C. 397–8, 410, 504
 Edström, A. 3, 6, 24, 27–8, 31, 33, 56, 64, 126, 137, 140, 148
 effectiveness of sports teams 363
 Eisenhardt, K. 436, 439, 441, 504, 506
 Eisenstadt, S. 4, 31
 Elliott, R. 355–6, 505
 emotional intelligence 67, 72, 305
 end-user accessibility 412
 Eriksson, C.B. 67, 323
 Estafen, B. 4, 31
 Etzion, D. 40, 279, 502
 Evans, P. 152, 175
 ex-host country nationals (EHCNs) 34, 55
 expatriate academics *see* academic expatriates
 expatriate adjustment *see* adjustment
 expatriate aid workers *see* humanitarian aid and development workers

- expatriate entrepreneurs
 - as minor theme in academic research 67
 - missionary 323–5
 - expatriate families *see* families
 - expatriate job performance, definition 110
 - expatriate performance *see* performance
 - expatriate research *see* case study research;
 - expatriate studies; methodological issues;
 - practitioners, expatriate research for and with; publishing research
 - expatriate studies
 - 1952–1979 overview 3–7
 - academic research
 - 1960s–2010 61–2
 - essential academic books 62–3
 - future of 69, 71, 73
 - major themes in academic articles 63–6, 70
 - minor themes in academic articles 66–7, 72
 - most frequent authors 67–9
 - business expatriates 31–41
 - defining migrants in 38
 - further research needed on adjustment 98–101, 107
 - lacking theoretical grounding in LGBTI field 210
 - methodological issues in
 - current status 394–7
 - data analysis 406–8
 - implications for theory, research and practice 409–13
 - present study 398–400
 - results 400–406
 - study conclusion 413
 - systematic comparative analysis 393–4
 - theoretical perspectives 397–8
 - missionary expatriates 325, 328
 - necessity 13
 - need for new theorizing 21
 - terminological confusion 24–7, 41
 - expatriate voting 66–7, 72
 - expatriates
 - adjustment 97, 153, 440
 - broadest definition 23–4
 - challenges
 - for companies 138–9, 143
 - relating to LGBTI 204–5
 - etymology 276
 - glossary of terms 54–7
 - historical understanding of 23
 - historical use of term 22
 - simple definition 22
 - expatriates of host-country origin (EHCOs)
 - 34, 37, 55
 - expectations
 - of global families and employees 483–5
 - member care 326, 330
 - Millennial expatriates 264–5, 270, 272–3
 - of women's role 251–3, 255
 - EY 56, 276–8, 281–4, 287–8
 - Eyben, R. 373, 377, 380–81, 385
 - Fabricatore, J. 6, 32
 - Fail, H. 343, 454–5, 478–9
 - Fakhri, S.M.A.K. 56
 - Falcous, M. 353–6, 358–9
 - families
 - of academic expatriates 339, 343–4
 - and adjustment 93, 99
 - adjustment 97
 - of aid and development workers 375, 379, 385
 - of female expatriates 241–2, 245, 249–51, 253–6
 - global
 - aim of study 468–9
 - definition 469–70
 - empirical findings 471–82
 - future research directions
 - gender issues 484–5
 - influence of time 484
 - multiple family stakeholders and multiple forms of global employees 482
 - positive influence of global employment on global families 483
 - resources 483–4
 - model of 470–71
 - non-traditional global employees and non-traditional family structures 481–2
 - non-traditional global employees and traditional family structures 479–81
 - traditional global employees and non-traditional family structures 481
 - traditional global employees and traditional family structures
 - family outcomes 475–9
 - global employee outcomes 472–5
 - typology 471
- of inpatriates 223, 236
- of international business travellers 40, 276–80, 287
- of international commuters 40, 281, 287
- of LGBTI expatriates 173, 206–7, 211, 213–14, 309
- of military expatriates 303, 306–7, 309
- of Millennials 264–6, 268–9
- of missionary expatriates 320–21, 323–6, 328, 330
- of short-term assignees 33, 283–4

- of SIEs 193
- of sports expatriates 352–3, 355
- as theme in academic research 64, 70
- of women in academia 499–501
- Fan, S.X. 25, 55
- Fanelli, D. 497, 505
- Farndale, E. 148, 152, 156
- Fast, L. 170, 175, 374–5, 377
- Fay, D. 187, 191–3, 197–8
- Fayerweather, J. 3–4
- Fechter, A.-M. 22, 368, 373–4, 377–9, 381
- Fee, A. 68, 162–3, 167, 170–71, 173–6, 189, 322, 369, 372–3, 377, 379–85, 505
- Feldman, D.C. 64–5, 68, 89, 154
- female expatriates *see* women expatriates
- Fenner, C.R. 298, 341
- Fenwick, M. 282, 369, 373, 377–81
- Festing, M. 261, 264–8
- FIFA 359, 362
- Findlay, A. 38–9, 56, 393, 483
- Fineman, S. 262, 264–5, 267, 269
- Fischlmayr, I.C. 160, 242, 244–6, 249, 251, 279, 471, 474, 480–82, 484
- Fish, A. 25, 64, 136, 502
- Fisher, K.L. 244, 246, 255, 298, 301–2, 304–5, 308
- Fisher, R. 202–4, 207, 209–10, 212
- Fitzsimmons, S.R. 233, 454, 457, 460
- Flett, R. 377–9
- flexpatriates 26, 40, 276–7, 323–4, 470
- Foote, M. 5, 31
- foreign direct investment (FDI)
 - increasing 139–40
 - need for 144
 - trends in 133–4
- foreign executives in local organizations (FELOs) 36, 55
- foreigner prejudice 243, 247–8, 251
- Forster, N. 25, 34, 55, 68, 108, 245, 248
- Fouraker, L. 4, 31
- fragmentation, overcoming 234–5
- Frese, M. 187, 191–4, 197–8
- Friedman, R. 451, 460
- fringe expatriates 65, 70
- Froese, F.J. 35, 54, 136, 187, 190, 337–8, 342–3, 378–9
- Frost, P.J. 490, 495
- Fu, J.Y.-H. 457, 461–2
- Fukuda, K.J. 24, 64, 468, 474, 483
- Furnham, A. 37, 83

- Galambos, N.L. 261, 267
- Galbraith, J. 3, 6, 24, 27–8, 31, 33, 56, 64, 126, 137, 140, 148
- Gama, E. 32, 39

- Gedro, J. 202, 205–9, 242, 244–5, 248, 255, 310
- gender issues for global families 484–5
- gender stereotyping 247–8, 255
- gender theories 253
- Generation Y expatriates *see* Millennial expatriates
- George, G. 497, 501, 510
- Georgeou, N. 372, 377, 380
- Gertsen, M.C. 227, 229, 231
- Ghodsee, K. 492, 499
- Ghosh, R. 264, 267
- Ghoshal, S. 210, 506
- Gibbert, M. 434, 441–3
- Gibson, P.A. 416, 427
- Gilpin, D.R. 162–3, 165
- Gingrich, H.D. 326, 328
- Girei, E. 374–5
- Girgis, M. 380–81
- Glanz, L. 83, 99, 505
- Glass, A. 264–6
- Glick, W.H. 25, 99
- global careerists 34, 55
- global employees
 - accelerated emergence of 468
 - family-related factors influencing success of expatriation 468
- further research directions
 - gender issues 484–5
 - influence of time 484
 - multiple forms of 482
 - positive influence 483
 - resources for families 483–4
- in global family model 470–71
- non-traditional
 - and non-traditional family structures 481–2
 - and traditional family structures 479–81
- partial view of family role 468
- traditional
 - family outcomes 475–9
 - global employee outcomes 472–5
 - and non-traditional family structures 481
- global mobility
 - challenges for 150
 - in-patriates 219–21, 234, 237
 - integration with GTM 148–9, 151–2, 155–6
 - LGBT status not barrier to 204
 - Millennials 266, 269
 - research for and with practitioners 420–28
 - specialists 97–8
- global production networks (GPNs) 177, 356–8
- global talent management (GTM)
 - future research directions 155–6
 - impact on expatriates

- during assignment 153–4
- repatriation and career development 154–5
- selection and decision to undertake assignment 151–2
- integration with global mobility 148–9, 151–2, 155–6
- introduction to 149–50
- as major theme in field of HRM 148
- understanding inpatriates from perspective of 230
- global value chains 356–8
- globally mobile employees 219–21
- Golden-Biddle, K. 417, 502, 504
- Gomez-Mejia, L. 25, 28
- Gong, Y. 33, 149
- Gonzalez, R.F. 5, 31, 62
- Graebner, M.E. 439, 504, 506
- Gratton, L. 261, 264, 267, 270
- Gray, D.E. 417, 419, 425–6
- Gray, S.J. 322, 343, 369, 372–3, 381–3, 505
- Green, A. 40, 281
- Green, N. 22–3, 37, 57
- Greenberg, S.H. 3, 31
- Gregersen, H.B. 6, 31–2, 63–4, 67–9, 73, 84, 88, 91–2, 108, 119, 124, 154, 468, 477–8
- Gregg, C.D. 327–8
- Grove, C.L. 84–5
- Groysberg, B. 264, 266, 269, 298
- GTM *see* global talent management (GTM)
- Gudykunst, W.B. 6, 83–5
- Guha-Sapir, D. 160, 171–2
- Gullahorn, J.E. 4, 83, 196
- Gullahorn, J.T. 4, 83, 196
- Guo, C. 55, 393, 396
- Gupta, R. 469, 476
- Gustafson, P. 40, 279–80
- Guzzo, R.A. 21, 66–7, 91, 108, 153

- Haider, M. 5, 31
- Hall, D.T. 193, 211
- Hall, E.T. 4, 197
- Hambrick, D.C. 252, 416, 503, 506
- Hammer, M.R. 6, 25, 54, 85
- Hanappi, D. 245, 254
- Hanek, K.J. 452, 454, 459, 461
- Hao, J. 37, 57
- Hapgood, D. 4, 31
- Harari, E. 7, 64
- Haritatos, J. 451–4, 461
- Harmer, A. 163, 373
- Harris, H. 24, 33–4, 38, 55, 151, 242, 244–5, 248, 278, 280–81
- Harrison, D.A. 27, 29, 32, 35, 41, 56, 64, 90, 95, 108–9, 116, 118, 122, 124, 306, 394, 410, 440, 472, 474–5, 477, 479, 482, 503, 505
- Harrison, E. 25, 244, 246, 250, 254, 374, 380
- Harry, W. 24, 55
- Harvey, M.G. 23, 25, 28, 32, 34–5, 39–40, 54, 57, 64–5, 67–8, 154, 162, 175, 202, 218–25, 229, 231–4, 236, 245, 250, 278–80, 339, 379, 393, 410, 468–9, 483–4
- Harzing, A.-W. 27–8, 32–3, 55–7, 68–9, 108, 127, 138, 140–41, 151, 218, 223, 228–9, 233–4, 306, 490, 492, 497–8, 510, 514
- Hashim, J. 335, 341–2
- Haslberger, A. 29, 32, 35, 41, 54, 63, 65, 68, 83–4, 88–90, 93, 95, 97–9, 116, 156, 202, 244–5, 249, 263, 327, 483, 501
- Hassan, A. 335, 341–2
- Hawley, D. 325, 328
- Hays, R.D. 5–6, 24, 32, 64, 108–9, 119
- headquarters (HQ)
 - and inpatriates 55, 136–7, 149–50, 218–37
 - and PCNs 28, 56
 - staff and HCNs 236–7
 - and subsidiary relationships, as theme in academic research 67, 72
- health issues 64, 66, 70
- Hechanova, R. xxii, 87, 91, 124
- Heenan, D. 5–6, 28, 31–2
- Heimsoth, D. 475, 481
- Heirmsmac, P.T. 245–6, 248
- 'helicopter parenting' 265–6, 269
- Henry, E. 4–5, 31, 61, 385
- Herleman, H.A. 477–8
- Hervey, E. 326, 328
- Hess, M. 177, 358
- heteronormativity 203, 212–13
- Heuser, E.A. 374, 381
- high-performance work systems 176
- Hill, R. 4, 31
- Hippler, T. 23, 35, 83, 88–90, 94, 98–9, 116, 153, 249, 501, 505
- Hirshon, J.M. 163, 167
- Ho, N.T.T. 55, 139
- Hochschild, A. 264, 270
- Hodgkinson, G.P. 413, 503
- Hodgson, F.X. 4–5, 31
- Hoerstring, R.C. 454–5, 457
- Högstrom, K.E. 326, 328
- Holtbrügge, D. 26, 191
- Hong, Y.Y. 451–2, 459–62
- Honoré, S. 264, 266–9
- Horn, S. 495, 515
- host country nationals (HCNs)
 - defining 55
 - as global family antecedent 476–8
 - in global mobility mix 149, 234

- and HQ staff 236–7
- interaction with, as measure of performance 153–4, 212
- interaction with expatriate aid workers 377, 380–84
- military expatriate interaction with 301, 304
- partners 472
- resources for global families 483
- and single-task expatriates 138
- spouses reluctant to meet 477
- studies on 7
- subsidiary managers 26
- as theme in academic research 64–5, 68, 70–71
- use of 33–4
- Howard, C. 6–7, 31–2
- Howe-Walsh, L. 36, 136, 187, 189
- Howell, M. 4, 31
- HQ *see* headquarters (HQ)
- Huber, P. 40, 281–2
- Hudson, S. 32, 373, 378–9, 382–3, 434, 444
- Huff, J. 326, 328
- humanitarian aid and development workers
 - as benefiting from military's experience 310
 - current state of research
 - expatriate challenges 373–4
 - expatriate learning outcomes 382–3
 - expatriate motivation 375, 377–9
 - interaction with HCNs 377, 380–81
 - personal and professional development 381–3
 - studies in literature 374–6
 - future research directions 381, 384–5
 - operating context 373–4
 - terminology
 - Aidland 368–9
 - definitions and actors 369–70
 - expatriates 372
 - organizational players 370–72
- humanitarian missionary expatriates 317–18, 323–4
- Hunt, N.A. 162–3
- Huntington, S. 298, 302
- Huson, G. 4, 31
- Hutchings, K. 54–5, 68, 241–6, 248–51, 255, 263, 303–5, 308, 468–9, 481, 502
- Huyhnh, Q.-L. 452–3
- Ibrahimovic, Z. 350
- IBTs *see* international business travellers (IBTs)
- identity *see* cultural identities
- IHRM challenges in sports clubs 360, 363
- Imaizumi, A. 91, 127
- immigrants *see* migrants/immigrants; skilled (im)migrants (SMs)
- Imundo, L. 5, 28, 32
- in-country adjustment 87
- individual work outcomes 107–9
- Inkson, K. 32, 35–6, 55–6, 63–4, 99, 136, 138, 142, 189–90, 196–7, 211, 350, 373, 378–9, 382–3, 385, 394, 434, 444, 514
- inpatriates
 - comparison with expatriates 220–21
 - defining 34, 55, 218
 - future research directions
 - different organizational contexts 235
 - diversity 237
 - families 236
 - HCNs and HQ staff 236–7
 - overcoming fragmentation 234–5
 - repatriation 235–6
 - typologies 235
 - as globally mobile employees 219–21
 - implications for theory and practice
 - additional constructs 233
 - analysis levels 232–3
 - new theoretical approaches 231–2
 - practical contributions 233–4
 - theoretical integration 230–31
 - new theoretical approaches
 - career-related decisions 232
 - demands and resources 231
 - inpatriate experience process 232
 - reasons for further research 218
 - review of existing research
 - building social capital 229–30
 - conceptual contributions 221–3
 - developing competency 223, 229
 - empirical contributions 223–30
 - selection and integration 222–3
 - strategic use 223
 - systemic integration 222
 - understanding psychological contract 230
 - as theme in academic research 65, 68, 70
 - in typology of missionary expatriates 322–3, 330
- Insch, G.S. 26, 242, 245, 248, 484
- Institute for Economics and Peace 160, 172
- institutional fit 500
- institutional theory 252–3
- integration
 - as acculturation strategy 86
 - of female MEs 308
 - of GTM and global mobility 148, 151, 155–6
 - of inpatriates
 - and selection 222–3
 - systemic 222
 - of LG members into military 309
 - theoretical 230–31

- theory of motivation to 198
see also bicultural identity integration (BII)
- intent to stay 478
- internal validity 411, 443
- international aid and development (IAD)
see humanitarian aid and development workers
- international assignments
 assigned expatriates 32–4, 54
 during assignment 153–4
 assignment failure 474
 assignment receptivity 67
 ‘assignment success’ 93–5, 119
 categorizing workers 24
 different policies 28
 female interest in 242–3, 249–50, 251
 individual work outcomes 107–9
 little sign of demise of 148
 post-assignment 154–5
 pre-assignment 151–2
 resistance to women undertaking 243, 251
- international business travellers (IBTs)
 comparison with international commuters
 background variables 285
 benefits of work-related travel 286
 burnout 286–7
 HR support 286
 job demands 286
 travel patterns 285
 work and personal life 287
 current status 278–80
 defining 39–40, 55, 276–7
 and family 479–82
 future studies 287–90
 nature of employment 276, 290
- international commuters
 comparison with international business travellers
 background variables 285
 benefits of work-related travel 286
 burnout 286–7
 HR support 286
 job demands 286
 travel patterns 285
 work and personal life 287
 current status 280–82
 defining 33, 40, 55, 277–8
 future studies 287–90
 nature of employment 276, 290
- international joint ventures (IJVs) 67
- international non-governmental organizations (INGOs) 171, 368, 371–5, 377, 385, 431
- International Security Assistance Force (ISAF) 297
- international sports labour migration theories 355–6
- international worker categorization 24
- interpersonal relations 457–8
- Iredale, R. 38–9
- Irvine, J. 327–9
- Isakovic, A.A. 337–8, 342, 344
- Ivancevich, J.M. 4–6, 31–2, 61, 64, 279, 286
- Jackson, N. 378–9, 381–3
- James, E.H. 161, 168, 174, 176
- James, K. 163, 166, 168, 171, 298
- James, S. 37, 316–17, 319, 328
- Janssens, M. 24–5, 57, 245–7
- Jenkins, S.R. 454–5, 457
- Jensen, M.T. 286, 480
- Jepsen, D.M. 339, 341
- Jiang, F. 244–6, 474
- job demands
 international business travellers 286–7
 military expatriates 301–2
- job demands–resources (JDR) model 231
- Johnson, C.N. 320–21, 323, 325
- Johnson, K. 434–7, 440–41
- Jokinen, T. 32–3, 35–6, 137, 187, 190, 197
- Jones, A. 382–3
- Jones, L. 6, 32
- Jonsson, E. 300, 305
- Joshua Project 320
- Joy, D.M. 326, 328
- Judge, T.A. 94, 517
- Jung, J. 338–9
- Kanungo, R.N. 23, 27–8, 32, 41, 108, 339
- Kaplan, D. 202, 205, 207–8, 211
- Karsaklian, E. 189, 379
- Katz, E. 4, 31
- Kawai, N. 113, 123, 127
- Keegan, W. 5, 32
- Kelan, E. 264, 266–8
- Kempen, R. 474–5
- Kennedy, A. 87, 153, 456–7
- Kiernan, P. 5, 31
- Kiessling, T. 222, 234
- Kilduff, M. 440, 506, 516
- Kim, E. 326, 328
- Kim, E.C. 335, 338–9
- Kim, Y.Y. 83–6
- King, R. 34, 38
- Kinnunen, U. 279–80, 286
- Kirk, S. 148, 152
- Klein, A. 355–7
- Klein, S. 476–8
- Klemens, M.J. 316, 320, 325–6, 328, 478–9
- Klingner, J. 511, 517

- knowledge management 176–7
 knowledge, role in adjustment 84–5
 knowledge transfer
 as advantage in academic–practitioner partnerships 419
 in developed and developing countries 139–40, 143
 and inpatriates 218–19, 227–30, 237
 and missionary expatriates 322–4
 as theme in academic research 64, 70
 Kobrin, S.J. 64, 107
 Kolde, E. 4, 31
 Kollinger, I. 242, 244, 246, 249, 474, 480–81, 484
 Kollinger-Santer, I. 279, 471, 482
 Konopaske, R. 28, 151, 281
 Koocher, G. 517
 KPMG 33, 40, 55, 276–8, 282–4
 Krahn, H.J. 261, 267
 Kraimer, M.L. 22, 25–6, 28, 32, 41, 55, 64, 67, 97, 107, 109–10, 113, 116, 119, 121, 123, 127, 148, 153–5, 233, 468, 472, 474, 501, 503, 505
 Kramar, R. 226, 230
 Kultalahti, S. 261–2, 266–7

 Laakso, M. 514–15
 LaFromboise, T. 452–4
 Lai, P. 321, 323–4
 Lam, H. 67, 454, 478
 Lambell, R. 369, 373
 Lance, C. 37, 504
 Lanfranchi, P. 355, 360–61
 Langford, M. 343, 454, 478
 language
 ability of spouse 472–6
 and adjustment 89, 91, 97, 472–4, 476
 aiding success 212
 barrier, for military expatriates 303
 and communication 141
 as minor theme in academic research 67, 69, 72–3, 502
 and performance 117–18, 121–2, 126–7
 and SIEs 192, 198
 Lanier, A.R. 6, 32
 Laser, J.A. 475, 481
 Lauring, J. 23, 35, 68, 118, 127, 191, 197–8, 243, 245, 250, 298, 335–9, 341–3, 378, 434, 436–8, 442, 444, 468, 474, 478, 483, 505
 Law, K.S. 67, 504
 Lay, T.H. 3, 22
 Lazarova, M.B. 34, 41, 55, 83, 95, 99, 106–11, 114, 116, 124–6, 138, 148, 153–5, 219, 231, 235–6, 245, 250, 306, 343, 469, 474, 477, 483

 leadership
 challenges for US military 306–10
 crisis 163
 in managerial performance 112, 114–15, 117–18
 missionary agency 330
 as theme in academic research 64, 70
 learning outcomes of aid and development expatriates 382–3
 Lee, F. 459, 462
 Lee, L. 107, 110, 114, 119, 125, 127
 Lemaitre, G. 23, 136
 LePine, J. 21, 506
 Lerbinger, O. 161, 163–5
 lesbian, gay, bisexual, transgender and intersex (LGBTI) expatriates
 current state of research
 dangerous locations 210
 discrimination 205–7
 duplicity (being in or out) 207–10
 female LBT expatriates 207
 opportunities, barriers and challenges 204–5
 definitions 203–4
 future research directions 214–15
 implications for practice 213–14
 increased interest in research on 202
 and military expatriates 309–10
 theoretical perspectives
 acculturation 211–12
 career anchors 211
 heteronormativity 212–13
 social capital 210–211
 Leung, A.S.M. 32, 242, 244–5, 247, 250, 339, 477
 Levine, M. 264–5
 Lewis, D. 369, 371–2, 384
 LGBTIs *see* lesbian, gay, bisexual, transgender and intersex (LGBTI) expatriates
 Lin, C.Y.-Y. 107, 126, 393
 Linehan, M. 25, 54, 68, 242, 244, 246, 250
 Linton, D.B. 326, 328
 Lischer, S.K. 175, 374
 Little, K.M. 326, 328
 local managers and colleagues 98
 localization 67
 localized expatriates (LOPATs) 36–7, 55
 Locke, E. 21, 506
 Locke, K.D. 417, 502, 504
 Lofquist, L.H. 84, 87–8
 Lovell, E.B. 5, 31
 Lowe, K.B. 245, 248
 Lowell, B.L. 39, 56, 394, 396
 Lundstedt, S. 4, 83
 Lussier, R. 490, 493, 500–501, 509, 511

- Lyons, S.T. 261–2, 264, 266–8
 Lysgaard, S. 4, 31, 83
- MacLachlan, M. 380–81
 Macomber, J.H. 92–3, 99
 Maddox, R. 6, 31
 Magee, J. 355–6, 360–61
 Maguire, J. 353–6, 358–61
 Mahoney, J. 25, 28–30, 54
 Mahoney, M. 511, 515
 Mäkelä, K. 152, 156, 190, 263
 Mäkelä, L. 55, 242, 244–5, 249, 279–80, 286, 475, 479–80, 484
 Malek, M.A. 95, 116, 124, 127, 477–8
 Maley, J.F. 218, 226–7, 230, 232
 Mallon, M. 35–6, 64, 125, 338–9, 378–9
 Mamiseishvili, K. 337, 342
 management of expatriates 64, 70, 153–4
 Mandell, M.M. 3, 31
 Manson, J. 316, 319, 328
 manuscript rejection 515–17
 Markus, H.R. 451, 460
 marriage breakdown 474
 Martin, C. 262, 265
 Martin, E.E. 326, 328
 Marvasti, A.B. 445, 504
 Mathur-Helm, B. 244, 246, 249
 Mavin, S. 242–4, 246, 248
 Mayerhofer, H. 26, 40, 55, 219, 271, 276, 278–9, 479, 481, 484
 Mayrhofer, W. 40, 55, 276, 480
 McDonnell, A. 148, 190, 335
 McDowall, A. 39, 279
 McElroy, J.C. 261–2, 264–6, 270
 McEvoy, G.M. 91, 94, 110, 119–20, 124, 502
 McFadden, C. 202, 205–6, 214
 McGrath-Champ, S. 163, 170, 173–5
 McKenna, S. 35, 56, 64, 137, 191, 197, 300, 337–8, 342–3, 378–9, 434–44
 McManus, S.E. 397–8, 410, 504
 McNamara, G. 24, 504
 McNulty, Y. 25–6, 30, 32, 35, 37–9, 54–5, 63, 67–9, 99, 141–2, 148, 151–4, 156, 160, 162, 173, 177, 190, 196–8, 202, 204, 207, 210, 213–14, 242, 244–6, 250, 255, 263, 280–81, 298, 304–5, 385, 445, 468–9, 474, 477, 481–2, 484–5, 501–2, 514
 McPhail, R. 24–6, 54, 160, 162, 173, 177, 202–4, 207, 209–15, 219, 242, 245–6, 249, 255, 308, 310, 470
 McWha, I. 380–81
 Megginson, L. 5, 31
 Meister, J.C. 261–2, 264, 266–70, 272
 member care approaches and services 316, 319–21, 325–8, 330
- Mendenhall, M.E. 21, 28, 32, 41, 64, 68–9, 87, 89, 92–3, 99, 109, 119, 127, 212, 305, 319, 505
 mentoring 66–8, 250–51, 383, 502, 510
 MEs *see* military expatriates (MEs)
 methodological issues
 components of research process 393–4
 conceptualization
 as component of research process 394
 current status 394–6
 implications for 409–10, 412
 results 400–402
 current status 394–7
 data analysis 394, 406, 408, 410
 data collection
 as component of research process 394
 implications for 411–12
 results 404–7
 end-user accessibility 412
 implications for theory, research and practice 409–13
 importance of systematic comparison 393
 present study
 aim and focus 398–9
 method 399–400
 recommendations for researchers and practitioners 411, 413
 relevant theoretical perspectives 397–8
 research design
 as component of research process 394
 current status 396–7
 implications for 410–12
 results 402–3
 results 400–407
 Meyskens, M. 35, 40, 276, 468
 Miceli, N. 223–4, 232
 Michailova, S. 25, 64, 140, 242–4, 246, 250–51, 282, 284, 308
 migrants/immigrants
 acculturation 86
 defining 25, 38–9, 55–6, 396
 dual identification 452
 and expatriates 22–3, 191, 194
 framework for understanding adjustment 86–7
 second-generation 377
 sports 353–6, 360
 terms reserved for 34
 see also skilled (im)migrants (SMs)
 military expatriates (MEs)
 characteristics
 interaction with host locals 301
 nature of work demands 301–2
 organizational commitment 300–301

- organizational cultural norms 302–4
- personal agency 300
- current status of research 304–6
- diverse nature of 298–300
- future research directions
 - field providing opportunities for researchers 310–11
 - leadership challenges for US military 306
 - LGBTI expatriates 309–10
 - military family 306–7
 - women in combat 307–8
- sport migration as closely related to 354
- study
 - aims, focus and context 297–8
 - conclusion 310–11
- Millar, J. 38, 284
- Millennial expatriates
 - competencies 261, 266–7, 271
 - context 265–6
 - current status of research 263–4
 - definitions 262–3
 - expectations 270
 - implications for theory, research and practice 270–71
 - limitations and future research directions 271–3
 - motivations 264, 267–9
 - relevance 261
- Miller, A.N. 497–8
- Miller, C. 511, 515
- Miller, E.L. 6–7, 31–2, 64–5, 67–8, 379
- Mills, T. 54, 136
- Minbaeva, D.B. 64, 140, 233, 282, 284
- Misa, K. 6, 32
- Mischel, W. 5, 31
- missionary expatriates
 - future research directions 328–30
 - mission worldview 317–18
 - from non-Western perspectives 319, 330
 - realities facing modern-day 316
 - research literature summary 325–8
 - study purpose and scope 316–17
 - trends and paradigm shifts
 - from countries to people groups 319–20
 - from ethnocentric to geocentric sourcing 319
 - from exclusive to inclusive 321
 - from full-time missionary to tentmaker 321–2
 - importance of changing context 318–19
 - from lifetime missionary to short-term expatriate 322
 - from missionary team to expatriate worker 320–21
 - from village to mega-city 320
 - typology 322–5
 - uniqueness 319
- missionary kids (MKs) 325–30
- Mitchell, T.R. 393, 399, 409, 411
- Mitroff, I. 164, 170–71
- Mizzi, R. 202, 212–13
- MK CART/CORE study 325
- MKs *see* missionary kids (MKs)
- Moeller, M. 25, 54, 218–20, 223, 230, 393, 410
- Mohn, T. 33, 57
- Mohr, A.T. 21, 34, 55, 276
- Mok, A. 458–62
- Mol, S.T. 41, 95, 106–7, 109–10, 114, 119, 122, 125, 127, 306
- Molloy, J. 21, 25–7, 505
- monoculturals 452, 454, 456, 461, 478
- Moore, A.M. 455–7
- Moriarty, G. 320–21, 325, 327–8
- Moritz, B. 262, 266–7
- Morley, M. 54, 57, 63
- Morris, M.A. 28, 64
- Morris, M.W. 459–62
- Morrow, P.C. 261–2, 264–6, 270
- Moskos, C.C. 301, 305
- Mosse, D. 369, 384
- motivation to expatriate
 - of aid and development workers 375, 377–9
 - in developed and developing countries
 - future research directions 142
 - lessons from literature 136–7
 - of expatriate academics 338–40, 342–4, 355
 - of IBTs, short-term and international commuters, as area requiring further study 289
 - of Millennials 264, 267–9
 - of missionaries 317, 322, 327
 - of SIEs
 - beyond careers 197–8
 - and OEs 378–9
 - of sports expatriates 351–2, 360–61
- Motowidlo, S.J. 110, 112–19
- MSLGROUP 269, 271
- Murphy, P.J. 162–3, 165
- Murray, J. 5–6, 32, 54
- Myers, B.A. 35, 56, 136, 350, 378
- Napier, N.K. 64, 242, 246, 248
- Nasholm, M. 24, 34, 55
- Nasser, R. 337, 339–41
- national culture
 - impact on women expatriates 242, 251
 - and inpatriates 220–21
- Naumann, E. 65–6, 92–3
- Navara, G. 37, 316–17, 319, 328
- Navas, M. 88–9

- Negandhi, A.R. 4–5, 31–2, 62
 Nesbeth, K. 474, 483
 Neuman, W.L. 344, 504
 Newman, J. 6, 32, 64
 Newman, S. 4, 31
 Newton Parks, F. 4, 31
 Nguyen, A.-M.D. 451–3
 Nicholas, H. 39, 279
 Nicholson, N. 91, 127
 Noethen, D. 107, 110
 North Atlantic Treaty Organization (NATO) 297
 Novicevic, M.M. 218, 222–3, 232, 234
 Nowotny, K. 40, 281–2
 Nutt, P.C. 298, 300
- Oberg, K. 4, 31, 61, 83, 196
 Oberholster, A.J. 319, 327, 329, 377–9
 Oberholster, B. 317–19, 321–2
 Oddou, G. 21, 24, 64, 87, 108–9, 119, 127, 212, 305, 319
 O'Donnell, K. 322, 328
 OECD 368–9, 394, 396
 OEs *see* organization-assigned expatriates (OEs)
 official development assistance (ODA) 368, 370, 372
 Okay-Somerville, B. 264, 270
 Olden, A. 6, 31
 Olson, D.H. 472, 476
 Ones, D.S. 65, 106–7, 109–10, 116, 118, 120
 open systems perspective 176
 ORC Worldwide 33, 39, 278, 282–4, 289
 organization-assigned expatriates (OEs)
 comparison with MEs
 interaction with host locals 301
 nature of work demands 301–2, 310
 organizational commitment 300–301
 organizational cultural norms 302–4
 personal agency 300
 definition 298
 formerly seen as moving in context of company's needs 137
 motivation for expatriation 378–9
 organizational commitment
 definition 340
 expatriate academics 340–41
 expatriate adjustment 94–5
 expatriate performance 109, 117–18
 military expatriates 300–301
 in taxonomy of managerial performance 115
 organizational cultural norms 302–4
 organizational learning 163, 167, 176–7
 organizational self-initiated expatriates (OSIEs) 26, 434, 436–40, 443–4
- Osland, J.S. 63, 191, 338–9, 458
 Osman-Gani, A.A.M. 25, 143
 Österberg, J. 300, 305
 overseas experience (OE) travellers and tourists 35, 56
 Oyserman, D. 451, 459, 461
 Özbilgin, M. 39, 137, 142, 188, 353
 Ozturk, M.B. 206–7, 213–14
- Paik, Y. 245–6, 251
 Paine Schofield, C. 264, 266–9
 Paisley, V. 202, 470
 Pandzic, J. 316, 320, 324, 327–8
 Pang, E. 138, 144
 Papavasileiou, E.F. 261–2, 264, 266–8
 parent country nationals (PCNs) 28, 33, 35, 54, 56, 150
 Pargneux, M.L. 33, 35–6, 189, 306, 379
 Parker, B. 91, 110, 119–20, 124
 Parker, P. 36, 505
 Parkinson, S. 369–70, 372, 374, 377–9
 Patel, D. 163, 165, 279
 Pattie, M. 109, 468
 Pauls, D. 325–6, 328
 Pauls, N. 325–6, 328
 PCNs *see* parent country nationals (PCNs)
 Pedersen, P. 32, 39
 Peiperl, M. 24, 28, 33, 55, 57, 137–8, 223, 226
 Peltokorpi, V. 35, 54, 68, 141, 187, 190
 Peltonen, T. 91, 281, 284
 Penrose, E.T. 4, 31
 Peppas, S.C. 65, 223–4
 perceived organizational support (POS) 67, 72, 121, 123, 171, 475–7
 performance
 and adjustment 94–6, 99, 109, 116, 120–24, 126–7, 153
 aid and development expatriates 383
 antecedents 119–24
 and assignment success 93–4
 of business travellers 289
 creative 458–9
 definitions 106–7
 expatriate job performance 110
 individual work outcomes 107–9
 of expatriate academics 341–3
 future directions 125–6
 of global employees 473–4
 and GTM 150, 153–4
 high-performance work systems 176
 implications for conceptualization of 124–5
 influence of spousal involvement 437
 'informants' 438
 in inpatriate literature 224–8, 230
 and LGBTIs 202, 205

- as major theme in academic research 64, 70
 - models
 - conceptual studies 113–16
 - empirical studies 116–19
 - relevant theoretical perspectives
 - comparisons 111–12
 - performance models 113–19
 - role of international mobility 149–50
 - and SIEs 198
 - study conclusion 126–7
 - work–home role 468
 - Perlmutter, H. 4–5, 28, 31, 53, 57
 - ‘perma-pats’ 36
 - permanent transferees (PTs) 37, 56
 - person–environment (P-E) fit 84, 86–90, 95–6
 - personal agency 300
 - personal initiative 193–5, 199
 - personality
 - Big Five traits 461
 - expatriate academics 341
 - expatriate performance 118, 120
 - influence of spouse’s 475–6, 478–9
 - military expatriates 305
 - practitioner research 428
 - as theme in academic research 65, 70
 - Peter, H.W. 3–4, 31
 - Petersen, E.B. 336, 343
 - Peterson, B.E. 37, 343, 454, 457, 478–9
 - Peterson, R.B. 6, 32, 64, 219, 223–4
 - Peytremann, I. 163, 298
 - Pfeffer, J. 234, 416
 - Phinney, J.S. 451–3, 457
 - Pierson, P.E. 318, 323
 - Pinto, L.H. 97, 107, 124
 - Plamondon, L.T. 37, 343, 454, 457, 478–9
 - Ployhart, R. 21, 25–7, 505
 - Plueddemann, J.E. 326, 328
 - Pocock, M. 321–2
 - Podsakoff, P.M. 21, 329, 409, 411, 504
 - Poli, R. 351, 356, 362
 - Pollock, D.C. 326, 328–9, 454, 458, 478
 - Polonijo-King, I. 378–9, 384
 - Porter, A. 316–17
 - Porter, G. 108–9
 - Powell, J.R. 319, 323, 326, 328
 - Powell, W.W. 174, 419
 - practitioners, expatriate research for and with
 - challenges and benefits 416–20
 - collaboration
 - future research directions 430, 432
 - recommendations for 429
 - typology of 429–31
 - in global mobility
 - conducting research 425–6
 - construction 426–7
 - contracting 423–5
 - diagnosis stage 421–2
 - entry stage 420–21
 - long-term engagement 427–8
 - public dissemination 427
 - quality agreement 422–3
 - Pratt, M. 368, 434, 437, 442, 504
 - Prensky, M. 264–5
 - PricewaterhouseCoopers 261, 264–6, 269, 278
 - Pringle, J.K. 35, 136, 350, 378
 - Pritchard, K. 261–2, 264–7
 - production networks 177, 356–8
 - Protestant Christian missionary expatriates *see* missionary expatriates
 - Pruthi, S. 28, 34
 - psychological adjustment 84, 87, 90, 456–7, 476
 - psychological contract 66–7, 72, 156, 170–71, 230, 265, 337
 - psychological health 478
 - psychological perspectives on sports migration 359
 - publishing research
 - handling manuscript rejection 515–17
 - how to publish
 - academic journals statistics 513
 - building publishing pipelines 509
 - developing publishing strategy 509–15
 - developing writing habits 508–9
 - finding and keeping co-authors 506–8
 - importance of 490–91
 - publish-or-perish
 - consequences of 498–9
 - as familiar aphorism 491, 497
 - institutional fit 500
 - quality vs quantity 497–8
 - as way of life in academia 497
 - women in academia 499
 - study conclusion 518
 - what to publish
 - current and emerging themes 501–2
 - gap-spotting vs problematization 502–3
 - niche areas 500–501
 - research design and methodological fit 504–5
 - rigour–relevance debate 503
 - ‘theoretical contribution’ 506
 - writing resources 492–6
- Puchmüller, K.M. 160, 242, 244–6, 251, 279, 480
- Pudelko, M. 127, 141, 384
- Punnett, B.J. 64, 134–5, 139, 373
- Purnell, E.M. 326–8
- Quigley, R.L. 373, 384

- Rajak, D. 368, 373–4, 380–81
 Ramirez, J. 171, 175
 Ramsey, R. 303–5
 Ranford, A. 281, 283
 Rasco, R. 326, 328
 recruitment/selection 64, 70, 151–2, 222–3, 248–9, 289
 Rehberg, W. 377–9
 Reiche, B.S. 34, 54–5, 137, 141, 143–4, 148, 150–51, 153, 218–20, 225, 227–32, 234, 236, 284, 421, 445, 503, 505
 Reio, T. 496, 504, 515–16
 Reis, C. 63, 143
 reliability, demonstrating 406, 408, 412, 443
 religious expatriates *see* missionary expatriates
 Ren, H. 83–4
 repatriation
 adjustment 326–7
 expatriates to and from developed and developing countries 139, 143
 in future inpatriate research 235–6
 intent 395
 as major theme in academic research 64–5, 68, 70, 501
 post-assignment in GTM 154–5
 retention *see* turnover/retention
 return on investment (ROI) 63, 67–8, 72, 150–52, 426, 501
 returnees 34, 39, 55
 reverse migrants 39
 Reynolds, C. 6, 31
 Richardsen, A.M. 242, 244–5, 248
 Richardson, D. 37, 355
 Richardson, J. 25–6, 35–6, 56, 64, 66–9, 125, 137, 191, 197, 300, 337–9, 342–3, 378–9, 394, 434, 436–8, 440–44, 469–70, 481
 rigour–relevance debate 503
 Ritchey, J.L.S. 326, 328, 330
 Ritchie, B.W. 162–3, 168–9
 Riusala, K. 64, 322, 475
 Robbins, S.P. 340–41
 Robert, D.L. 318, 322
 Robie, C. 28, 64
 roles of expatriates 64, 68, 70
 Romanowski, M.H. 337, 339–41
 Roos, H. 246, 249
 Rosik, C.H. 316, 320, 324, 326–8
 Roth, S. 368, 374, 380, 384
 Rousseau, D.M. 170–71, 340, 413, 503
 Rowley, E. 172, 175, 374
 Rua, O. 107, 124
 Ruigrok, W. 434, 441–3
 Rundle, S. 323, 325
 Russell, M.L. 321, 323, 325
- Rynes, S.L. 416, 419–20, 427, 503–4, 507, 516–17
- safety and security *see* security
 Salamin, X. 244–6, 250, 254, 503
 Salt, J. 38, 276, 283–4
 Sam, D.L. 452, 456
 Sandberg, J. 434, 440, 445, 502, 506
 satisfaction
 and adjustment 86–8, 93–5, 121
 of expatriate academics 341–2
 and lesbian status 205
 missionary 325, 327
 motivation to expatriate 136
 of SIEs 198
 spousal 472–3, 475, 479, 483
 as theme in academic research 65, 70
 Saxonian, A. 34, 38
 Scandura, T.A. 393, 409, 411
 Schäfer, L. 261, 264–8
 Schoepp, K.W. 337, 340–41, 343
 Scholarios, D. 264, 270
 Schollhammer, H. 4–5, 31
 Schuler, R.S. 148–9, 151, 261–2, 277, 280
 Schütter, H. 468, 475, 484
 Schwandt, J. 320–21, 325, 327–8
 Schwind, H. 6, 32
 Schyns, B. 36, 136, 187, 189
 Scullion, H. 25, 33, 54, 57, 63–4, 108, 119, 148–50, 154, 190, 242, 244, 246, 250, 277, 280
 sea turtles 55
 Searle, W. 83–4, 87, 153, 456
 security
 accommodating expatriate diversity 160
 current status of crisis management research 162
 defining major concepts 161–2
 focusing on individuals' lived experiences 177–9
 frameworks for understanding crisis response 162–7
 future research directions 174–7
 as minor theme in academic research 66–7, 72–3, 502
 moderators of expatriate threats and organizational responses to crises 171–4
 theoretical perspectives on crisis management and expatriates 167–71
 Segalla, M. 496–8, 511–12, 517
 Seibert, S. 516–17
 Selby, S. 327–8, 330
 selection *see* recruitment/selection

- self-initiated expatriates (SIEs)
 defining 25, 29, 34–7, 56, 187–91, 194, 196, 394
 in developed and developing countries
 future research directions 142
 lessons from literature 137
 employed 36–7, 56
 in field of sports 350, 352–5, 361–3
 future research directions 199
 as major theme in academic research 65–6, 68, 70–71
 motivations for expatriation 197–8, 378–9
 and personal initiative 193–5, 199
 research implications
 careers issue 197
 defining 194, 196
 motivation beyond career 197–8
 time issue 196–7
 as self-starting, proactive and persistent employees 191–3, 195, 198
 within research methods comparison
 aim of study 393
 classification of 395
 conceptualization 394, 396, 400–402, 409–10, 412
 data analysis 406, 408, 412
 data collection 404–7, 411–12
 present study 398–400
 recommendations 411–13
 research design 396–7, 402–3, 410–12
see also organizational self-initiated expatriates (OSIEs)
- self-initiated repatriates (SIRs) 37
- self-starting, proactive and persistent employees 191–3, 195, 198
- Selmer, J. 23, 32–3, 35–6, 54, 56, 63–5, 67–8, 91–2, 117–18, 127, 141–2, 151, 187, 189–91, 196–8, 242–5, 247, 250, 298, 335–9, 341–3, 378, 394, 396, 409, 434, 436–8, 442, 444–5, 454, 468, 474, 477–8, 483, 505–6
- Shaffer, M.A. 21, 23–5, 27, 29–30, 32–3, 35, 40–41, 54, 56, 64, 68–9, 95, 108–9, 113, 116–19, 122, 124, 126–7, 153, 155, 232–3, 235, 249, 276–80, 306, 393–4, 468, 470, 472, 474–9, 483, 503
- Sharma, K. 228, 230
- Shay, J.P. 95, 99, 153
- Sheehan, C. 397–8, 410
- Shen, J. 97, 244–6, 474
- Shenkar, O. 64, 67, 303
- Shetty, Y. 5, 31
- Shih, H.-A. 341, 475
- Shin, J.C. 338–9
- Short, D.C. 416–17
- short-term assignees (STAs)
 cost containment 289
 current status 282–4
 defining 33, 56–7
 family tension 482
 as having high mobility risk rating 288
 move from lifetime missionary 322
 nature of employment 276, 278, 290
 travel patterns 283–4
- short-term international assignments (STIAs)
 flexible careers paths for Millennials 270–71
 military expatriates 300
 non-traditional global employees 481
 Shortland, S. 242, 244–51, 255, 308, 434–7, 442, 444
- Showail, S.J. 125, 127
- SIEs *see* self-initiated expatriates (SIEs)
- Siggelkow, N. 434, 504
- Sigismund Huff, A. 490, 499–500
- Silvanto, S. 143, 321
- Silverman, D. 438, 442–3, 504
- Sinangil, H.K. 106, 110, 116, 118, 120
- single-task expatriates
 future research directions 142–3
 nature of 137–8
- skilled (im)migrants (SMs)
 confusing terminology 39, 191
 defining 25, 55–6, 394
 need for differentiation with SIEs 142
 within research methods comparison
 aim of study 393
 classification of 395
 conceptualization 394, 396, 400–402, 409–10, 412
 data analysis 406, 408, 412
 data collection 404–7, 411–12
 present study 398–400
 recommendations 411–13
 research design 396–7, 402–3, 410–12
 as unlike athlete migrants 354
- Smillie, I. 369, 372–3
- Smola, K.W. 262, 264, 267, 270
- social capital
 building inpatriate 229–30
 female expatriates 252
 LGBTI expatriates 210–11, 245
- sociocultural adjustment 84, 87, 142, 456–7, 476–7
- Søderberg, A.-M. 227, 229, 231
- Söderman, S. 359–60, 363
- Soeters, J. 297, 305
- sojourners 37–8, 57
- Sonnabend, H. 6, 31
- Sparrow, P. 40, 55
- spirituality 67, 72, 327

- sports expatriates
 advancement by seeking career abroad
 350–51
 challenges for professional sports clubs
 IHRM challenges 360, 363
 minors and children 362
 sporting team effectiveness 363
 growing number of 351–2
 investigating international transfers
 global value chains, commodity chains
 and production networks 356–8
 international sports labour migration
 theories 355–6
 psychological perspectives on sports
 migration 359
 sports politics and governance 358–9
 typology of athletes' migration motives
 360–61
 theoretical perspectives 355–60
 towards defining self-initiated expatriation
 in sports 352–5
- spouses
 within global family
 definition and classification of 469–71
 empirical findings 472–82
 future research directions 482–5
 as independent in 'couple' 204
 involvement in expatriate careers study
 436–8
 military 303, 306–7, 309
 and partners, as theme in academic research
 64, 70
 and performance 122
 relocating with LGBTI expatriate 214
 separation as stressful 283
 in traditional expatriation 202, 468
 in traditional missionary family 320–21, 324,
 328
 in typology of missionary expatriates 323–4
- Spruill, J.W. 280–81
- staffing
 and inpatriates 218–23, 225–6, 230–31,
 234–7
 international strategy 479–80
 LG workers in global 204, 214–15
 in taxonomy of managerial performance 115
 as theme in academic research 64, 68, 70
- Stahl, G.K. 7, 34, 83, 148, 155, 279–80, 300,
 378–9, 474
- Stake, R.E. 434, 504–5
- Stalker, B. 242–4, 246, 248
- Starbuck, W. 502, 509, 511, 517
- Starr, J. 378–9
- Starr, T.L. 33, 279, 283–4, 479, 481–2
- Status of Forces Agreements (SOFA) 309
- Staw, B.M. 245, 506
- 'stealth expatriates' 288
- Steffen, T. 323, 325
- Steinmetz, L. 4–5, 31
- Stening, B.W. 61, 68, 298
- Stephens, G.K. 64–5, 91, 98, 119, 153, 472
- Stern, A.H. 5, 31
- Stirling, C.M.B. 325, 327–8
- Stirrat, J. 368, 373–4, 380–81
- Stoddard, A. 163, 175, 368, 373–5
- Stopford, J.M. 4–5, 31
- Striker, J. 40, 279
- Stroh, L.K. 65, 68–9, 155, 245, 247, 249,
 468
- success
 adjustment as criteria of expatriate 109
 'assignment' 93–5, 119
 attempts to identify variables contributing
 to 119
 criteria for 120–23
 and failure, as theme in academic research
 64, 70
 families 265, 279–80, 468
 inpatriate 223, 225–6, 237
 for LGBTI expatriates 204, 212–14
 as linked to goals 430, 432
 missionary 316, 319, 321, 324, 327, 329
 as not inverse concepts 109
 publishing/career 490, 492, 497, 499–501,
 506, 509
 sporting 352
- Suddaby, R. 21, 27, 394, 409, 506
- Sugden, J. 355–6, 360–61
- Sullivan, A. 434, 436, 444
- Sullivan, L. 434, 436
- Sullivan, S.E. 197, 211, 264, 268, 509
- Sullivan, S.L. 373–5, 434, 436, 444
- support networks
 for adjustment 97
 LGBTI 208
 responsibility for 250–51
- Sussman, N.M. 451, 456, 461
- Sutton, C.D. 262, 264, 267, 270
- Sutton, R.I. 245, 416, 506
- Suutari, V. 24, 32–5, 39–40, 55–6, 64, 68, 83,
 94, 97, 137, 154, 187, 190, 263, 278, 280,
 282, 284, 322, 350, 378–9, 475, 505
- Syed, J. 22, 35, 38–9, 56, 136, 393, 410
- 3-D model of adjustment 84, 88–90, 99–100
- Tadmor, C.T. 452, 455, 458, 460–61
- Taft, R. 84, 86–7
- Tahvanainen, M. 33, 56, 65, 278, 282, 284, 470,
 480
- Tait, E. 37, 55

- Takeuchi, R. 68, 89, 91, 93, 95–6, 107–9, 116, 124, 127, 153, 298, 306, 339, 393, 410, 469–70, 472, 474–5, 503, 505
- talent flows 139–40, 143
- talent management 67, 72, 502
see also global talent management (GTM)
- Tan, D. 25, 28–30, 54
- Tan, E.S. 138, 142–3
- Tansky, J.W. 108–9
- Tarique, I. 148–9, 219, 261–2, 454, 478
- Tassell, N. 377–9
- taxation 64, 66, 70
- Tayar, M. 202, 471
- Taylor, A. 5, 31
- Taylor, M. 353, 355, 360–61
- Taylor, S. 242, 246, 248
- Taylor, W.D. 319, 321–2, 327–8
- TCKs *see* third culture kids (TCKs)
- TCNs *see* third country nationals (TCNs)
- Teague, F.A. 6, 31
- Tempel, A. 140, 143
- Tenopir, C. 511, 514
- tentmakers
 definition 320
 as job-takers 325
 move from full-time missionary 321–2
 in typology of missionary expatriates 323–4
- Terjesen, S. 264, 270
- terminological confusion 24–7
- Tetlock, P.E. 452, 458
- Tett, R.P. 106, 127
- Tharenou, P. 23, 27–8, 32–7, 40–41, 54, 56–7, 67, 190, 196, 198, 225, 229–31, 241–5, 249, 298, 353, 393–5, 398, 411, 468, 470, 481, 484, 505
- Tharmaseelan, N. 38, 268, 272
- ‘theoretical contribution’ 506
- theory building 25, 417, 439–41
- theory of planned behaviour (TPB) 140–41
- theory of work adjustment (TWA) 84, 87–8
- third country nationals (TCNs) 7, 26, 33, 54, 57, 150, 223, 226, 234–5
- third culture kids (TCKs)
 in academic research articles 328
 cross-cultural adjustment 478
 definition 454
 as missionary kids 325–30
 need to replicate past research results 329
 psychological well-being 479
 tendency towards prejudice 458
 as theme in academic research 67, 72
- third cultures 454–5
see also adult third culture kids (ATCKs);
 third culture kids (TCKs)
- third sector expatriates 66–7, 371–2
- Thite, M. 25, 34, 55
- Thomas, D.C. 25–6, 28, 34–5, 41, 55, 63–5, 83, 89, 92–3, 95, 99, 107–9, 114, 116, 124, 153, 230, 506, 514
- Thomas, G. 378–9, 381–3
- Thompson, D. 4, 31
- Thorn, K. 35, 56, 136, 190, 378–9, 394
- Tiesler, N.C. 354–5
- Toh, S.M. 55, 98, 236
- Torbiorn, I. 24, 33, 56, 62, 64, 84–5, 107, 115, 118, 378
- Toyne, B. 7, 31, 64, 222
- Traavik, L.E.M. 242, 244–5, 248
- traditional expatriate missionaries 320–24
- transpatriates 322–3, 330
- travel benefits 286, 343, 378
- travel patterns 277–8, 285, 323–4
- travel problems 161, 249, 279–80, 286, 288–9, 480
- Trembath, J.-L. 36, 335, 337
- Triandis, H. 4, 31
- Trimble, D.E. 320–21, 328, 330
- trust-building 420–21
- Tsang, E.W.K. 434, 439–40
- Tsurumi, Y. 6, 32
- Tucker, M. 6, 31
- Tung, R.L. 3, 7, 25, 28, 31–4, 39, 54–5, 62, 64–5, 68–9, 109, 115, 119, 152, 242, 244–8, 378, 456, 468, 470, 504, 506
- Tungli, Z. 28, 33, 55, 137–8, 223, 226
- Turney, R. 327–8
- turnover/retention
 data difficult to capture 108
 embeddedness perspective applied to 229
 of expatriates on developmental assignments 155
 impact of poor HR practices 287
 meanings of 94–5
 of Millennial expatriates 265, 267–8, 270–71
 and motives of SIEs 198
 need for repatriation strategy linked to 155
 rates of repatriated inpatriates 236
 relationship with organizational performance 154
 in research on missionary life 321, 327–8
 as theme in academic research 65–6, 70
 and time issue 196–7
- Tyler, K. 264–6
- UNCTAD 133, 135, 140, 357
- Union of International Associations 368, 372
- United Nations 38, 144, 320, 372, 451
- United Nations Volunteers 372–3

- Unstead-Joss, R. 377–9
 Useem, J. 4, 31, 61, 325, 328–9, 454
 Useem, R.H. 4, 31, 61, 325, 328–9, 454
- Vaiman, V. 35, 54, 149–50, 263, 393
 Van der Heijden, J.A. 153, 219, 225
 Van Der Zee, K.I. 475, 479
 Van Dyne, L. 264, 266
 van Erp, K.J. 468, 476, 478
 van Oudenhoven, J.P. 454, 457, 478
 Van Reken, R. 326, 328–9, 454, 458, 478
 Vance, C.M. 30, 35, 55, 64, 68, 137, 190, 198, 244–6, 250–51, 335, 350
 Varma, A. 68, 245, 247
 Vaux, T. 368, 374, 379, 385
 Verschuren, P.J.M. 93, 96
 Vian, T. 372–3
 Viitala, R.L. 261–2, 266–7
 virtual workers and global domestics 23–4, 57
 Viswesvaran, C. 65, 97, 107, 109–10, 116
 Vivian, J. 4–5, 31
- Wallace, W. 4, 31
 Walters, K. 454, 478–9
 Wandersee Wiemer, B.J. 326, 328
 Wang, J. 162, 168
 Ward, C. 83–4, 87, 96, 153, 456–7
 Watkins, M.D. 164, 167
 Waxin, M.F. 91–2, 97–8, 472
 Wayne, S.J. 41, 67, 107, 109, 116, 119, 121
 Weedon, G. 356, 359
 Weeks, K.P. 474, 478, 502
 Wei, Y.-C. 107, 126
 Weisbord, E. 454, 478
 Welch, C. 56, 434, 504, 506
 Welch, D.E. 65, 115, 191, 276–7, 279–80, 283–4, 286, 378, 468, 480, 482
- well-being
 conceptualization 161
 expatriate
 categories of crisis most likely to threaten 171–2
 and duty of care perspective 170
 importance of information 176–7, 179
 LGBTI 210
 of MKs 326–7
 sectoral differences in attitudes to 173–4
 of military family members 306
 psychological 87, 171, 210, 303, 305, 326, 456–7, 478–9
 subjective 83, 89–90
- Wen, W. 37, 57
- Westman, M. 40, 249, 279, 288, 479–81, 483–4, 502
 White, C. 320, 323–4
 Whiting, R. 261–2, 264–7
 Whitman, M.F. 337–8, 342, 344
 Wiese, D.L. 67, 475, 478–9
 Wilcox, D.K. 327–8
 Wilcox-King, A. 21, 506
 Wille, C. 375, 377
 Williams, E.A. 393, 409, 411
 Willis, K. 39, 56
 Wilyerd, K. 261–2, 264, 266–70, 272
- women expatriates
 in case study research 435, 437, 444
 current research status 243–4
 methodologies 245–6
 theories 244–5
 trends 246
 definitions 243
 in developed and developing countries 135, 142
 expanding opportunities for 241
 female LBT expatriates 205, 207
 future research directions
 foci for future studies 253–4
 theoretical lenses for examining 252–3
 women from developing economies 254–5
 women in government, NGOs and not-for-profit organizations 255
 women in non-traditional family situations 255–6
 as major theme in academic research 64–5, 68, 70, 501
 under-representation 241–4, 247
 sports 352
 themes in prior research
 bias in selection process 248–9
 female interest in international assignments 249–50
 perceptions of foreigner prejudice 247–8
 resistance to women undertaking international assignments 251
 responsibility for support networks 250–51
 women in combat 307–8
 work qualities 241
 women in academia 499–500
- Wong, D. 138, 142
 Wood, J. 25, 64
 Wood, P. 276, 283
 Woodberry, R.D. 318, 322
 work demands *see* job demands
 work–family balance 474–5

- work outcomes
 - academic expatriates 340–43
 - effect of general adjustment 127
 - individual (definition) 107–9
- work performance, global employees 474
- workplace experiences of academic expatriates 339–41
- World Bank 370–71
- Worm, V. 56, 276, 279, 286, 468, 480, 482
- Wright, P.M. 233, 342, 498
- Wright, T. 207–8
- writing
 - developing writing habits 508–9
 - reports 426–7
 - resources 492–6
 - ‘theoretical contribution’ 506
- Wrobbel, K.A. 326, 328
- Yan, A. 21, 26, 41
- Yang, Z. 398–9, 410
- Yeoh, B. 38–9, 56, 143
- Yep, G. 203, 212
- Yin, R.K. 417–18, 426, 435–6, 440, 443, 504
- Yoshino, M.Y. 6, 32
- Zeira, Y. 5–7, 32, 64, 67–8, 107–9
- Zikic, J. 24, 39, 56, 338–9, 394