Research Handbook of Expatriates

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Contents

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,

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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 'inpatriation'. 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

xxiv

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.

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PART I

HISTORY OF EXPATRIATE STUDIES AND ITS CURRENT STATE OF PLAY

2. The concept of business expatriates
Yvonne McNulty and Chris Brewster

INTRODUCTION

In this chapter we provide an overview of the conceptual development of business expatriates over the past 50 years. We do so in order to clarify the terms and concepts used to define business expatriates in the midst of an increasing level of 'international mobility confusion' about expatriates in general (Andresen et al., 2014, p. 2). We suggest that this confusion has arisen from the absence of a clear conceptual definition about expatriates, and business expatriates (those employed in organizations) in particular (see Podsakoff et al., 2016). Although past ideas in expatriate studies have been insightful (e.g., Guzzo et al.,1994; Mendenhall and Oddou, 1985; Yan et al., 2002), recent changes in our collective understanding about expatriates requires new theorizing (see Locke, 2007). Our point of departure from prior summaries of international mobility taxonomies (that is, empirically driven categorizations, for example, Andresen and Biemann, 2013), typologies of international work (that is, theoretically driven categorizations, for example, Andresen et al., 2014), and reviews of global work experiences (Shaffer et al., 2012) is that we do not broaden the scope of global work beyond expatriation as others have done. Rather, due to an increasing proliferation of terms and sloppy application of concepts in the field of expatriate studies, most especially over the last decade, our goal is to narrow the focus to establish construct clarity (Locke, 2012) and to develop a theory-specific statement (Suddaby, 2010), in this case about business expatriates. Our intention is threefold: (1) to illustrate poor construct clarity by demonstrating that the word 'expatriate' no longer adequately describes the concept it claims to investigate in management studies (see Molloy and Ployhart, 2012); (2) to assist the field of expatriate studies to be clearer about whom it is actually researching (see Boddewyn et al., 2004); and (3) to stimulate and provoke a necessary debate towards improving conceptualization of the business expatriate concept, from which more relevant, and perhaps even novel, theoretical insights can be gained in the future (see LePine and Wilcox-King, 2010).

In this chapter, we provide an overview of early academic research on expatriates in general, and of business expatriates more specifically, in light of the rapid growth in new forms of expatriates and other types of international work (Bozkurt and Mohr, 2011; Collings et al., 2007). We use our own work and the work of others to critically reflect upon a long history of conceptualizing that has simultaneously contributed to new knowledge about business expatriates as well as (in our opinion) limited its potential. To focus our critique, we first conducted an extensive search of the academic literature, in English, from the most common databases including Business Source Complete, Google Scholar and Web of Science (including EBSCO Host, IngentaConnect, Emerald Fulltext and PsychINFO, among others), as well as manual searches to locate chapters and monographs. As our intention was to be as exhaustive as possible within the limits of searchable databases, we searched for peer-reviewed and non-peer-reviewed journal articles, chapters

and books and unpublished works and theses, regardless of year of publication, impact factor and discipline as others might have done (see Andresen et al., 2014; Kraimer et al., 2016). Following others (e.g., Tharenou, Chapter 20 in this volume), we used more than 20 keywords to search titles and abstracts for relevant articles dating back as far as could be found, a sample of which includes the keywords: expatriate(s), expatriation, global mobility, international mobility, repatriate(s), repatriation, inpatriate(s), impatriate(s), international assignment(s), assignee(s), global career(s), international career(s), international work, migrant(s), migration, immigrant(s), immigration, sojourner(s), business traveller(s) and flexpatriates(s). With these articles in hand, we then adopted a branching approach to segment a range of common themes in this literature about international workers and their international work experiences, which suggests that the majority of articles and studies fall into one of four categories: business expatriates, sojourners, migrants and business travellers.

Based on extant literature and our overview, we begin by defining expatriates more broadly and providing an overview of the categorization of international work experiences. We then critique the conceptualization of business expatriates by first discussing the problem of terminological confusion in the field of expatriate studies in general, and then developing a clearer theory-specific statement about business expatriates in particular. Next, we examine business expatriates in the literature and categorize them into two streams – organization-assigned expatriates (AEs) and self-initiated expatriates (SIEs) – including in each stream their various types and forms. Critiquing the literature to determine the distinction between business expatriates and sojourners, migrants and business travellers follows this. Lastly we draw some conclusions and provide a glossary of terms for future research.

DEFINING EXPATRIATES MORE BROADLY

In its simplest form, the broadest definition of 'expatriate' is that of a person living outside their native country (*Oxford Dictionary of English*, 2015) or who has been sent or exiled abroad (Collins Dictionaries, 2011). Green (2009, p. 308) contends that expatriation is a contradictory concept whereby, 'The meaning of expatriation . . . varies depending on who is initiating the act, the state or the individual, and whether or not it is voluntary. The state banishes; the subject can choose to depart.'

In the last century, the term 'expatriate' was historically used to describe Westerners who have lived abroad for varying lengths of time (Cleveland et al., 1960; Copeland and Griggs, 1985; Fechter, 2007; Lay, 1925), including artists, musicians, colonials, writers (for example, Hemingway, Fitzgerald, Stein), and generally anyone else (for example, small-scale entrepreneurs, teachers, those working for small local non-governmental organizations, students, interns, journalists and volunteers) with a mission of some kind (Curnutt, 2000). If in paid employment, they are typically classified as 'local hires' and they receive local salaries (Bickers, 2010; Cohen, 1977; Earnest, 1968; Morrison, 1993). Recently, the term 'expatriate' has also been used widely to describe all categories of movers, including migrants (Al Ariss and Syed, 2011; Andresen et al., 2014). Doing so suggests that the number of expatriates globally is extremely large, perhaps more than 200 million (Clarke et al., Chapter 6 in this volume). Fechter (2007, p. 6) notes that:

the word 'expatriate' is recognized across the spectrum of different foreign nationalities [despite the fact that] the term 'expatriate' is socially contested, politically and morally charged, ambiguous, and is linked to particular notions of ethnicity and class . . . [a] pertinent reason to employ the term is its prominence in discourse among foreigners, whether through positive identification or emphatic dissociation.

Green (2009) argues that a truly historical understanding of expatriates requires interpretation of their contribution to the international labour market through various phases that range from 'welcomed newcomer' to 'traitor', and eventually 'emissary' (p. 307). In noting that the definition of expatriates can be contradictory, where interpretations include expatriation as a form of exile by third parties (that is, all foreign-born persons living abroad, regardless of the current or eventual duration of their stay) (Dumont and Lemaitre, 2005), as well as a voluntary act on the part of individuals (that is, withdrawing one's self from residence in, or allegiance to, one's native country) (Collins Dictionaries, 2011), common to most definitions is the idea that expatriates engage in physical mobility by 'geographically relocating across national borders' (Andresen et al., 2014, p. 2303). Like migrants, expatriates have been conceptualized as living somewhere other than in their home country – 'home' being determined by their passport and citizenship[1] – thus undertaking a 'change in their dominant place of residence' (ibid., p. 2303).

Based on a combination of extant literature (e.g., Andresen et al., 2014; Aycan and Kanungo, 1997; Green, 2009), the broadest definition of an 'expatriate' is therefore:

> a person who lives outside their native country, and is physically mobile across international borders, whether for professional or personal reasons, whether for short or long periods of time, whether organizationally sponsored or not, and regardless as to whether one is crossing an ocean ('going overseas', as one might do from Brazil to Australia) or moving across land ('going abroad', as one might do from the USA to Canada).

Importantly, this broad definition encompasses all the categories to which expatriates can belong, that is, anybody who ventures abroad for a finite (whether a relatively short or long) period of time, including those who might eventually do so permanently, and for purposes that range from paid and unpaid employment to professional and personal aspirations, family and personal life, supply of and demand for one's occupation, politics, personal finances and personality (Andresen et al., 2012c; Dickmann et al., 2008; Hippler, 2009; Selmer and Lauring, 2011). Critically, the requirement for physical (as opposed to psychological) mobility excludes employees whose roles do not require short- or long-term geographical relocation and/or movement, for example 'virtual expatriates' (Collings et al., 2007), 'global virtual team members' and 'global domestics' (Shaffer et al., 2012), and domestic international managers (Tharenou and Harvey, 2006) and global managers

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[1] There is an argument to be made, however, as to whether citizenship or legal residency status matters. Consider, for example, that the children of expatriates, despite having a passport of their parents' home-countr(ies), may never have lived there and view themselves as 'expatriates' when they visit there with their parents. Conversely, these same children may consider a country in which they are born and have lived most of their life as 'home', although technically their lack of citizenship of that country deems them to be expatriates. These children, as adults, might very well be viewed as global citizens for whom 'home' could be anywhere, and 'expatriate' could be a constant state of being no matter where they are; for example, even if they repatriate to their passport country to attend university, they will likely feel more like an expatriate there than in the host country from which they have come.

with worldwide coordination responsibilities (Cappellen and Janssens, 2010c) who do not engage in business travel.

CATEGORIZING INTERNATIONAL WORKERS: AN OVERVIEW

Prior research has categorized international workers and their international work experiences using typologies and taxonomies in a number of ways. Some research has classified international workers according to the purposes of their assignment (Derr and Oddou, 1991; Edström and Galbraith, 1977, 1994; Hays, 1974; Mayrhofer, 2001; Torbiörn, 1994), their professions (Mahroum, 2000) or their types (Andresen et al., 2014). Others have focused on career trajectories including approaches to the international experience (Andresen and Biemann, 2013; Siljanen and Lamsa, 2009) and career orientations (Zikic et al., 2010), or the frequency of mobility, that is, the number of times they go abroad (Borg, 1988; Suutari, 2003), the number of countries they work in or the businesses they work for (Banai and Harry, 2004; Nasholm, 2014), and their length of stay in the host country (Fukuda and Chu, 1994). Still others have used classifications that focus on combinations that include the length of the assignment and intensity of the individual's cultural exposure (Baruch et al., 2013; Harris et al., 2003; Peiperl and Jonsen, 2007; Suutari et al., 2013), assignment length, number of assignments and commitment toward global assignments (McPhail et al., 2012), and high or low degrees of non-work disruption, cognitive flexibility and physical mobility (Shaffer et al., 2012).

For our purposes here, we are interested in business expatriates, and that leads us to exclude from our definition three other groups in our categorization – sojourners, migrants and business travellers – which we explain later in the chapter. We use two initial dimensions at the core of the expatriate definition – time and purpose – to justify our categorization as well as our exclusion of these three categories when defining business expatriates. Our goal in doing so is to overcome international mobility confusion by providing greater construct clarity about the fundamental concept which, we believe, is at the heart of our research: business expatriates. We argue that sloppy and imprecise definitions threaten the construct validity of the expatriate concept because the measures used in empirical studies may not accurately represent the underlying concept being tested (Cappelli, 2012). It may then be difficult to draw inferences from research and to quantitatively assess and compare findings across studies (see Bono and McNamara, 2011).

TERMINOLOGICAL CONFUSION

We detail below the recent interest in expanding analysis of the different forms of expatriation. This has usefully widened the scope and depth of the subject and made a valuable contribution to establishing the field of expatriate studies and in guiding research. But it has also led to an increasingly sloppy use of language, the import of meaningless jargon more appropriate to 'consultancy' reports, and general confusion in the use of concepts. This seems to apply much more in the international management (IM) and international human resource management (IHRM) fields, though other disciplines that study expatriates (migration, population studies, human geography, organizational psychology and

behaviour) have not been immune. We argue that there is now a considerable problem with 'jangle fallacy' (Molloy and Ployhart, 2012) and a series of ill-thought-through constructs that 'do not necessarily sum to a coherent whole' (Johnson et al., 2012, p. 63).

We contend that for serious academic endeavour construct clarity is vital. It is necessary to challenge existing assumptions and to develop greater clarity in the meaning attached to the term 'business expatriate' which, we argue, is the implied focus of the majority of research conducted in the field of expatriate studies but is not made explicit. Our endeavour is especially necessary in light of a plethora of different sets of authors defining expatriates in different ways in terms of the overall scope of expatriation, the range of potential means of expatriation and its various types (e.g., Andresen and Biemann, 2013; Collings et al., 2007; Doherty and Dickmann, 2013; Mayrhofer et al., 2012; McPhail et al., 2012; Shaffer et al., 2012). Some of the typologies contribute to theory building (see Doty and Glick, 1994 for a critique) and some empirically examine the classificatory structures they propose (e.g., Andresen et al., 2014; Andresen and Biemann, 2013; Cappellen and Janssens, 2010a; Cappellen and Janssens, 2010b). Andresen et al. (2014) systematically review existing definitions of AEs, SIEs and migrants in general and, as Tharenou (Chapter 20 in this volume) summarizes it:

> found 246 definitions of the terms. Their qualitative content analysis indicated no consistency in how AEs, SIEs and migrants were defined, also revealing that several criteria were used . . . They concluded that there were problems with construct definition and validity, especially for the migrant construct: 'migrant' was an umbrella construct for all types of expatriate, but some migrants were not expatriates. The conclusion suggests that a careful initial conceptualization of the constructs of AE, SIE and [skilled migrants] in empirical studies is required for clarity and distinctiveness.

Other typologies and taxonomies suffer from familiar problems in expatriate research (small samples, limited country coverage, atypical firms, unreliable measures of a single informant, lacking in theoretical underpinnings) (e.g., Al Ariss, 2010; Harrison and Michailova, 2013; Richardson et al., 2013; see Cascio, 2012 and Kraimer et al., 2016 for important critiques) and confuse different levels of analysis. Some are just descriptive or even prescriptive (Baruch et al., 2013).

Many expatriate studies use different terminology to refer to the same thing: for example, corporate expatriate, corporate executive, corporate manager, expatriate manager, managerial expatriate, managerial candidate (Andreason, 2008; Hammer et al., 1998; Harvey, 1989; Harvey and Moeller, 2009; Linehan and Scullion, 2002; Spiess and Wittmann, 1999; Tan and Mahoney, 2004; Thomas et al., 2005); international manager, international assignee, international personnel, internationally mobile manager (Andresen and Biemann, 2013; Arthur and Bennett, 1995; Forster, 1992; Harvey, 1997; Osman-Gani and Akmal, 2008); international assignments, international work assignments, expatriate appointments, overseas assignments, long-term assignments (Fish and Wood, 1996; Gomez-Mejia and Balkin, 1987; Kraimer et al., 2016; McNulty et al., 2013; Tung, 1981); expatriates of host country origin, ex-host country national, ethnically similar/ethnically different expatriates (Fan et al., 2016; Fan et al., 2013; Thite et al., 2009; Tung, 2008; Tung and Lazarova, 2006); and international expatriate management, international HRM, expatriate HRM (Brewster and Scullion, 1997; Fish and Wood, 1993). In other (even recent) instances terminology is redundant, as for example in the case of foreign

expatriates (Holtbrugge and Ambrosius, 2015), or foreign sojourns (Baruch et al., 2013) and foreign assignments (Anderzen and Arnetz, 1997; Daniels and Insch, 1998). There are examples of where meanings have been poorly defined and terms are used interchangeably in the one article (see 'international', 'expatriate', 'overseas' and 'foreign' assignment which are used interchangeably in Kraimer et al., 2016, p. 17; Kraimer et al., 2012, p. 404; Thomas et al., 2005, p. 341; Yan et al., 2002, p. 373). Other troubling examples include using the term 'expatriates' (to imply AEs) to exclude other groups that have already been conceptualized as business expatriates; see, for example (among many possibilities), how Collings et al. (2007, p. 204) use 'self-initiated expatriates' in contrast to 'expatriates', when in reality all are business expatriates: 'The key implication of the increasing number of SIEs who are joining the global labor market is that MNCs [multinational corporations] can make use of these employees . . . at a lower cost than expatriates.'

Yanadori (2015, p. 195) also uses the term 'expatriates' but specifically excludes third country nationals (TCNs) (possibly implying that their compensation may differ from traditional expatriates), despite the fact that TCNs have for many years been conceptualized as business expatriates: 'When subsidiary managers are not expatriates – they could be either HCNs [host country nationals] or TCNs – the design of their compensation practices has attracted researchers' attention.'

A particularly big problem is that the field of expatriate studies seems to have a penchant for inventing new labels that almost always refer to categories for which there is an already perfectly serviceable term. Examples (again, among a sample of many possibilities such as the above, as well as others) include: 'flexpatriates' for repeated or extended frequent travel (Mayerhofer et al., 2004a); propatriate, glopatriate, self-initiated corporate expatriates (SICEs), organizational self-initiated expatriates (OSIEs), intra-SIEs, company-assigned expatriates (CAEs) for AEs (Altman and Baruch, 2012; Andresen et al., 2014; McNulty et al., 2009; McPhail et al., 2012; Richardson et al., 2013); inter-SIEs and 'drawn expatriates' for SIEs (Andresen et al., 2014); and halfpats for bi-culturals (Teagarden, 2010). The result is that, rather than becoming clearer, the subject matter of expatriation has become increasingly muddied. Not only do researchers often fail to define their terms adequately, but they make (often unstated) assumptions about the people they are researching: that, for example, they will all have been sent from their multinational enterprise's (MNE) headquarters, or that they are all managers, or that they all know nothing about their new country before arriving there, or that forms of international experience that were previously undiscussed in the literature are suddenly new or growing just because there is more literature about them. This makes the comparison of findings difficult or, worse, impossible because we cannot be sure who it is that people are actually researching.

While some would argue, inevitably, that a multitude of terms being used to describe business expatriates is of less consequence than the underpinning characteristics and implied meanings they represent, we strongly suggest that continued ambiguity surrounding the 'business expatriate' term does not need to be tolerated, nor should it be. If it were, then research in the area of expatriate studies would continue to be compromised by terminological sloppiness and jangle fallacy (Molloy and Ployhart, 2012) resulting in the worrying problems of construct redundancy and construct proliferation, that is, where 'old and new constructs overlap to such an extent they are largely interchangeable', resulting in a 'proliferation of definitions, indeterminate construct boundaries, and confounded measures' that causes confusion and misinterpretation (Klein and Delery, 2012, p. 59).

Based on our overview of the literature, it has already led to a poor understanding of the underpinning characteristics of business expatriates. It has further resulted in an inability to compare specific research findings or, if they are compared, the risk is that such comparisons are dubious, leaving the field developing a series of independent projects from which we can learn little and, practically, of failing to support global staffing practices for expatriates and the multinational enterprises (MNEs) that employ them.

Building on other efforts (e.g., Andresen et al., 2014; Aycan and Kanungo, 1997; Harrison et al., 2004; Shaffer et al., 2012), it is necessary to challenge existing assumptions and to develop greater clarity in the meaning attached to the term 'business expatriate'. Following Suddaby's (2010) advice, while there are likely to be additional descriptions and terms that can be found in extant literature about business expatriates that will emerge in new research to add to those presented here, especially needed is 'clear agreement on the substantive definitional content' (p. 348) – in this case about business expatriates – which is linked to their core characteristics. Molloy and Ployhart (2012) argue that the problems of construct redundancy and construct proliferation exist not because a concept lacks sufficient operationalization, but because 'the theoretical argument as to what the construct is – and why – is left implicit' (p. 154). This leads us to the conclusion that the field of expatriate studies requires, as a starting point, a theory-specific statement about business expatriates.

DEFINING BUSINESS EXPATRIATES: A THEORY-SPECIFIC STATEMENT

To establish a theory-specific statement about business expatriates, we first develop a glossary of terms (see Appendix 2.1). We then review for what purpose expatriates are used. Business expatriates have as their major purposes (Edström and Galbraith, 1977; Harzing, 2001; Tharenou, 2013): (1) managerial control of the foreign subsidiary and coordinating with headquarters; (2) transferring firm-specific knowledge, skills and culture; (3) developing managers for international positions; and (4) filling positions when qualified personnel are not available. Notably, these purposes reflect the skills and abilities attributable to business expatriates who are both AEs and SIEs. Tharenou (2013) suggests, for example, that SIEs (defined as 'professionals and managers who, unsupported by an organization, expatriate to seek work in a host country for an indefinite period, usually over a year'; ibid., p. 336) are not a suitable alternative to corporate assigned expatriates (also known as AEs) for the purposes of control, transfer, running the foreign operation, and management development (which require firm-specific competencies), but may be suitable for filling technical and lower and middle management positions (requiring more generic, specialist competencies), managing within the subsidiary, and responding to the local environment (which requires cross-cultural and host location-specific competencies).

Based on our literature search, we conclude that empirical studies show that the historical conceptualization of the business expatriate category is borne out of business employment, wherein the demand for business expatriates is 'tailored to the organizational context of working abroad' (Andresen et al., 2014, p. 2303) and arises from expatriates' ability to help organizations meet their business objectives (Bruning et al., 2012; Edström

and Galbraith, 1977; Mendenhall et al., 1987; Pruthi et al., 2009; Tharenou and Harvey, 2006; Tung, 1984a; Tungli and Peiperl, 2009).

In much of the earliest literature, definitions had been, in effect, subcontracted to practitioners. Research was done on IHRM specialists or through them with the people they identified as expatriates, thus often implicitly excluding many who would now be included. One of the earlier explicit definitions, from the late 1990s, defined expatriates as being:

> employees of business or government organizations who are sent by their organization to a related unit in a country which is different from their own, to accomplish a job or organization-related goal for a pre-designated temporary time period of usually more than six months and less than five years in one term (Aycan and Kanungo, 1997, p. 250)

The definition implies: (1) that expatriates are assigned by organizations; and (2) that employment by an organization is a key characteristic, thus distinguishing business expatriates from non-business expatriates (for example, tourists, immigrants, retirees, refugees, sojourners) on the basis of the temporary, voluntary and task-related nature of their institutionally sponsored employment.

Aycan and Kanungo's (1997) definition encompasses a number of potentially different policies about international assignments. Companies could, for example, apply ethnocentric policies (Heenan and Perlmutter, 1979; Perlmutter, 1969), sending abroad parent country nationals (PCNs) who were imbued with the headquarters (HQ) culture and understood the HQ ways of operating (e.g., Harzing, 2001). This was important, because one key rationale for sending them was coordination and control (Edström and Galbraith, 1977), best achieved by someone who already knew the HQ mentality and operations. Authors of these studies also suggested that expatriation could be used by the organization as a learning device, and there is now considerable evidence (Dickmann and Doherty, 2010; Mendenhall et al., 2002) that the expatriate experience is the best possible mechanism for individual development. Many businesses, for example, use it specifically for that purpose or as a development and/or evaluation mechanism in their talent management programmes (Cerdin and Brewster, 2014; Collings, 2014). Edström and Galbraith (1977) also noted that expatriates were often used to provide technical knowledge and expertise where these were not available in the local operation or in a particular country; for example, pipework engineers, credit experts and information technology (IT) specialists.

The research that followed picked up on, and immediately confused, the rationales for using expatriates with their seniority and qualifications. This resulted in the first seeds of conceptual ambiguity being introduced about who business expatriates were, because definitions continued to be mostly implied rather than made explicit. Thus, the coordination and control element meant that there was often an assumption in the literature that business expatriates would be in managerial positions, when many were not. A number of studies have conflated business expatriates with managers (e.g., Chang et al., 2012; Gomez-Mejia and Balkin, 1987; Imundo, 1974; Konopaske et al., 2005, 2009; Lenartowicz and Johnson, 2007; Morris and Robie, 2001; Tan and Mahoney, 2004; Thomas et al., 2005). The 'filling of specialist positions' rationale developed into assumptions that business expatriates would inevitably be highly qualified technical specialists (Harzing, 2001; Tharenou and Harvey, 2006), although there has been an intriguing lack of attention paid to those who were sent for this purpose (see Kraimer et al., 2016 for an

important critique). Technical specialists were often, though by no means always, sent just until the problem was fixed or local expertise had been developed, thus having shorter assignments. Such business expatriates could be, and often were, recruited from outside the organization (for example, as locally hired foreigners), unlike those sent for other reasons, who were invariably selected from existing staff and then sent abroad.

The next updated explicit definition of business expatriates continued to assume these characteristics, defining them as 'employees of business organizations, who are sent overseas on a temporary basis to complete a time-based task or accomplish an organizational goal' (Harrison et al., 2004, p. 203). This definition has been more or less repeated in other (e.g., Tan and Mahoney, 2004, p. 200) and more recent conceptualizations (e.g., Shaffer et al., 2012, p. 1286; Haslberger et al., 2014, p. 2). Andresen et al. (2014, p. 2308) defined an expatriate more broadly, as 'an individual who moves to another country while changing the dominant place of residence and executes legal work abroad. As such, the expatriate has migrant status.' Critically, Andresen et al. (2014) qualify their broad definition by providing additional clarification of SIEs and AEs on the basis of dependent versus independent employment, initiator of the job search (organization versus individual), work contract partner (current versus new), and organizational mobility (internal versus external), noting that their conceptualization has 'discourse limitations' and that 'it might be hard to overcome the preconceptions of some readers' (ibid., p. 2310).

Even though these definitions have attempted to bring more clarity to the meanings of the word 'expatriate' in the fields of global mobility and international management, we contend that confusion still remains and there is no consensus as to how to define expatriates more broadly, and business expatriates more specifically. We suggest that for researchers, while a clear definition of expatriates (in general) would be helpful, the more urgent need is to develop a theory-specific statement about business expatriates, given their implied focus (as the unit of analysis) in decades of prior research in the field of management studies. In other words, if we claim to be IM or IHRM researchers, then our focus must remain on individuals employed in, or impacted by, management settings (for example, expatriates, their families and other key stakeholders). It is for this reason that our chapter is focused on business expatriates in the context of legal business employment in order to distinguish them from non-expatriates and refugees.

Our focus does not ignore the fact that defining expatriates (as well as business expatriates) is made more difficult when taking into account psychological and time considerations that impact upon individual choice in the decision to expatriate, to migrate or to transition between the two (see Andresen et al., 2014; Shaffer et al., 2012). Rather, we acknowledge that transitions between expatriate and migrant status – for example, from business expatriate to skilled migrant, or business expatriate to immigrant entrepreneur or 'expatpreneur' – complicate any attempt to define the meanings of expatriate more broadly. But acknowledging the occurrence of transitions from one category to another does not absolve us from clarifying the meaning and boundaries of the categories.

We narrow our unit of analysis to business expatriates as a starting point on the basis of several combined and necessary criteria: that we are (1) IM and IHRM scholars; who are (2) interested in individuals who engage in international geographical mobility; (3) with legal employment; (4) with organizations and businesses; and (5) to a country of which they do not hold citizenship. We thus define business expatriates as:

> legally working individuals who reside temporarily in a country of which they are not a citizen in order to accomplish a career-related goal, being relocated abroad either by an organization or by self-initiation, or directly employed within the host country.

Our definition builds on and develops prior definitions of business expatriates, whatever terminology was used, by: (1) using more appropriate terminology; that is, 'business' as opposed to 'corporate', thus being more inclusive of non-corporate expatriates in non-corporate occupations such as those in government, military, education, arts, sports and aid organizations that have been the focus of recent research (see Part IV of this *Research Handbook*); and (2) including in our conceptualization the initiation to work abroad, thus extending prior definitions that have tended to limit business expatriation to expatriates with only AE characteristics (Shaffer et al., 2012) or to define AEs and SIEs separately as types of expatriates (Andresen et al., 2014). By including all forms of initiation of the decision to move, our definition encompasses expatriates that are AEs and SIEs, including those with AE and SIE characteristics (see McNulty and Vance, 2017) that dictate the particular type of international work they may choose to engage in. This, of course, can change over the course of their career (that is, the definition accounts for transitions). The definition implies that business employment is a key characteristic, thus distinguishing business expatriates from non-business expatriates (for example, tourists, immigrants, retirees, refugees, sojourners) on the basis of the temporary, voluntary and task-related nature of their institutionally sponsored employment.

An enhanced terms and conditions element of the definition is rarely stated, but usually assumed. Whilst there are anecdotal discussions of companies, especially in Europe, where work and residence permits are not required for European citizens and there is a heavy reliance on sending staff to other countries on local terms and conditions, these always seem to include some form of enhanced travel arrangements, expenses and so on. It is also the case that government employees and employees of intergovernmental organizations apply the same 'international' terms and conditions in all countries but invariably include salary adjustments and additional expenses for accommodation, schooling and other cost of living items. Our point is that, generally, assigned business expatriates expect and invariably receive additions to their salary package that are not made available to local employees doing the same job. For many organizations, the enhanced package and the accompanying administration of the transfer and the compliance requirements in themselves define assigned expatriation. Our definition nonetheless does not distinguish expatriates on the basis of their remuneration; that is, it holds irrespective of whether they are: (1) remunerated on a home-based balance sheet (full package) or host-based local (no benefits) approach (McNulty, 2016); or (2) may even be unpaid, as in the case of some religious expatriates. Nor does the definition depend on whether the individual is formally recognized as an expatriate for the purposes of policy and payroll by the organizations that employ them.

We also note that expatriation requires the individual to be living in a country of which they are not a citizen (see also Tan and Mahoney, 2004, p. 200). In some small (but perhaps growing) minority of cases this may be unnecessarily limiting: there will be bi-cultural people (Furusawa and Brewster, 2014) with dual nationality and children who have grown up with expatriate or migrant parents in one country whilst having or being entitled to a passport from another; when they transfer there, the experience may be so similar to that

of other expatriates that we would want to include them. These exceptions will be few, however. We contend that this theory-specific statement about business expatriates supports the major purposes for which expatriates have been (and will likely continue to be) utilized in the IM and IHRM disciplines.

The implications of our definition are significant. If we take as a starting point that the vast majority of extant literature about expatriates has only vaguely defined the unit of analysis or, worse, left it implied, then as studies progress into the future there will be less certainty about who is actually being studied. Clearer definitions about the unit of analysis need to be made explicit. The problem, unless checked, is likely to become an even bigger one if the sheer amount of prior studies is any indication.

BUSINESS EXPATRIATES IN THE LITERATURE

Serious academic research into our current understanding of business expatriates began in the 1950s (Crowther, 1959; Howell and Newman, 1959; Huson, 1959; Lysgaard, 1954, 1955; Mandell, 1958; Mandell and Greenberg, 1954; Penrose, 1959; Thompson, 1959; Wallace, 1959) with the strong push towards corporate internationalization (Coase, 1937; Dunning, 1958; Fouraker and Stopford, 1968; Kolde and Hill, 1967; Perlmutter, 1969). A growing interest in expatriates continued into the 1960s with seminal publications by Gonzales and Negandhi (1967) and Ivancevich (1969),[2] and other articles that examined the cross-cultural contact of business managers (Gonzalez, 1967; Katz and Eisenstadt, 1960; Megginson, 1967; Oberg, 1960; Useem et al., 1963), expatriate selection (Borrmann, 1968; Haider, 1966; Hodgson, 1963; Lovell, 1966; Peter and Henry, 1962a; Steinmetz, 1965, 1966; Stern, 1966; Triandis, 1963), compensation (Schollhammer, 1969), success factors (Kiernan, 1963; Newton Parks, 1963; Vivian, 1968), knowledge transfer (Negandhi and Estafen, 1965) and performance (Peter and Henry, 1962b). Research included studies of expatriates in non-corporate settings, for example the military (Campbell, 1969), aid organizations (Taylor, 1968) and the United States Peace Corps (Hapgood and Bennett, 1968; Henry, 1966; Mischel, 1965).

Early development of the business expatriate concept (e.g., Black et al., 1992; Tung, 1988) was undoubtedly borne out of research in the 1970s that focused on why companies used expatriates (Baker and Ivancevich, 1970; Beeth, 1973; Edström and Galbraith, 1977; Shetty, 1971), their management practices (Brandt and Hulbert, 1976; Negandhi, 1971; Sethi and Swanson, 1979; Toyne, 1976), their selection (Alpander, 1973b; Howard, 1974a; Maddox, 1971; Miller, 1973, 1977; Perlmutter and Heenan, 1974; Teague, 1970; Tucker, 1974), their communities (Cohen, 1977; Olden, 1979) and their compensation (Foote, 1977; Reynolds, 1972; Sonnabend, 1975). Correspondingly, studies began to appear about expatriates themselves: their decision-making criteria when undertaking an international assignment (Mincer, 1978), success and failure characteristics (Alpander, 1973a; Baker

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[2] These texts are a fascinating time capsule in themselves: note the terminology in the titles. Ivancevich cheerfully assumes that the United States (US) can be equated with the whole of North America, and is plainly only interested in 'executives'; Gonzales and Negandhi cheerfully assume that all such executives will be men; both assume that the problem is 'overseas', so that presumably there are no issues with US executives in Canada, Mexico or other parts of Latin America.

and Ivancevich, 1971; Hays, 1971, 1974; Imundo, 1974; Lanier, 1979; Miller, 1972; Miller and Cheng, 1978; Negandhi, 1974; Newman et al., 1978), training needs (Jones, 1975), gender roles (Adler, 1979), assignment outcomes (Miller, 1975; Misa and Fabricatore, 1979), role requirements (Daniels, 1974a, 1974b; Keegan, 1974) and repatriation concerns (Comay, 1971; Gama and Pedersen, 1977; Heenan, 1970; Howard, 1974b, 1979; Murray, 1973). Although there continued to be a strong focus on Japanese management practices more broadly (Tung, 1984b), research into Japanese MNEs also started to emerge (Peterson and Schwind, 1977; Tsurumi, 1978; Yoshino, 1976).

As a result, attention was now focused on corporate expatriates and especially those who were managers, that is, business employees who relocated abroad to fulfil some purpose for their company (Aycan and Kanungo, 1997; Harrison et al., 2004). The 'corporate expatriate' term is a label that has remained to this day, being defined as 'employees of business organizations, who are sent overseas on a temporary basis to complete a time-based task or accomplish an organizational goal' (Shaffer et al., 2012, p. 1286). This developed into a strong interest in people employed by organizations who were engaged in long-term international assignments (see Bonache et al., 2010; Briscoe et al., 2009 for summaries) defined as lasting between one and five years (Harzing, 2004). Corporate expatriates have been commonly referred to as 'traditional expatriates' (Suutari and Brewster, 2009) and long-term assignees (LTAs) (McNulty et al., 2009), and less frequently as business expatriates (Hudson and Inkson, 2006; Selmer and Leung, 2003, 2007). Haslberger et al. (2014, p. 2) define a corporate expatriate as 'someone who takes a job in a country other than his or her own for a period of time, intending not to stay in that country after that period of time'.

Most of the early studies (e.g., Black and Gregersen, 1991; Caligiuri, 2000; Harvey, 1985; Mendenhall et al., 1987; Shaffer and Harrison, 1998; Sieveking et al., 1981; Tung, 1981, 1987; Zeira and Banai, 1984), that provided a valuable platform for later researchers, were conducted via the IHRM departments of companies or amongst the heads of such departments. The result was that questions of definition were in effect left to the companies: if the individual was recognized as an expatriate by the IHRM department of the MNE, then they were studied as expatriates; if not, they were excluded. Further, because much of the early research was thus led by practitioners, it was they who 'dictated the research agenda', resulting in a large body of descriptive research that lacks theoretical rigour and conceptual precision (Kraimer et al., 2016, p. 19).

Assigned Expatriates

The major contribution from the research on corporate expatriates has been the concept of organizationally assigned expatriates (AEs); people whose careers often unfold within one organization which seek to help them improve their career advancement within the company through multiple long-term assignments (Jokinen et al., 2008). They may also, during their career, move from one organization to another; a familiar occurrence around repatriation time, according to the research (Black and Gregersen, 1991; Suutari and Brewster, 2003). Organizationally assigned expatriates have been referred to as assigned expatriates (Andresen et al., 2012b; Andresen et al., 2014; Biemann and Andresen, 2010; Jokinen et al., 2008), company-assigned expatriates (CAEs) (McNulty, 2013; McNulty et al., 2013; Tharenou, 2013) and company-backed expatriates (Doherty et al., 2011).

AEs usually relocate abroad for periods of time of between two and five years (longer for Japanese expatriates), which is in line with them being provided traditional career management that is controlled and directed by the organization to facilitate a match between organizational and individual needs in pursuit of its continued competitive advantage, including the repatriation of AEs to the home country as deemed necessary (Andresen et al., 2012c; Tharenou, 2013). The crucial part of the definition is that their employer sends them.

Assigned expatriates can also, therefore, include those employed in another country as short-term assignees (STAs): people engaged in an international assignment lasting up to one year (Brookfield Global Relocation Services, 2016; Harris, 2002; KPMG, 2011; ORC Worldwide, 2008; Shaffer et al., 2012; Suutari et al., 2013). In practice many short-term assignments are less than three months, especially for project work where they are dependent on completing a particular task (Suutari et al., 2013), and the cut-off point is usually six months, because after that, in a lot of countries, STAs become liable to questions about where they should be paying tax, national insurance and other fiscal requirements. In line with the usual confused terminology in expatriate studies, STAs have also been referred to as 'secondees', that is, people asked by the organization to temporarily relocate to another department for a short period of time (Baruch et al., 2013; Baruch and Peiperl, 2000; Renshaw and Ghobadian, 2015); and in the consulting field as 'talent swaps', that is, short-term assignments in which employees in the same company from different countries temporarily switch jobs for up to a year (Mohn, 2015). STAs have been the subject of much conceptual confusion, being positioned as: business expatriates (Baruch et al., 2013; Starr and Currie, 2009; Tahvanainen et al., 2005); business travellers, that is, non-expatriate global workers in the same category as international commuters (Shaffer et al., 2012); and as both (Suutari et al., 2013). This is likely due to STAs having some characteristics of both categories as determined by the purpose of their assignment and the amount of regulatory cross-border compliance (for example, work permit, tax, residency, social security and pension) required for them to work abroad (see Dickmann and Debner, 2011 for a critique). For example, a few STAs on longer assignments of up to one year may relocate with their families, although in general this is rare, and STAs generally continue to be paid on a home country basis and to receive significantly more remuneration than they would receive at home (like business expatriates).

Until recently, corporate expatriates have been conceptualized predominantly as PCNs (employees who are citizens of the headquarters country location of the company, from which they are sent to an international subsidiary) (Edström and Galbraith, 1977; Harzing, 2004; Torbiörn, 1997), expatriating out of the parent company headquarters to which they are typically expected to return (Cerdin and Pargneux, 2010; Colakoglu and Caligiuri, 2008; Gong, 2003; Jokinen et al., 2008). Recent research (e.g., Andresen and Biemann, 2013; Baruch et al., 2013) has indicated a growth in the utilization of third country nationals (TCNs), individuals that are citizens not of the home country where the corporate headquarters is located, nor of the host country where they are employed, but are from a third country where they have lived either temporarily or permanently before agreeing to move to the host country (Briscoe et al., 2012; Scullion and Collings, 2006; Selmer, 2002; Torbiörn, 1997).

The use of host country nationals (HCNs), citizens of the host-country employed on 'local' terms and conditions (Scullion and Collings, 2006; Tungli and Peiperl, 2009), is

less clear; whether they are just local employees or whether they are replacing expatriates or filling potential expatriate positions is unclear from the research that has attempted to look at this issue (Pruthi et al., 2009).

Corporate expatriates engaging in sequential assignments from one foreign location to another, with or without first repatriating, by stringing together reassignments into meaningful sequences for their professional benefit, have been conceptualized as career expatriates (Dickmann and Harris, 2005; Stahl and Cerdin, 2004; Thomas et al., 2005), serial expatriates (Bozkurt and Mohr, 2011), repeat expatriates (Nasholm, 2014), global careerists (Suutari et al., 2012) and the highly mobile (Forster, 2000). From a more ethnocentric point of view, expatriates assigned from a subsidiary to headquarters have been called 'inpatriates' (Reiche, 2006; Reiche et al., 2009), or reverse expatriates (Binetter, 2010). The aim of such an assignment is to provide these people with an international perspective and to expose them to the corporate culture and a network of contacts. They are almost always expected to repatriate home (Pruthi et al., 2009; Tharenou and Harvey, 2006).

Another contractual form within the category of assigned expatriate involves expatriates of host-country origin (EHCOs), defined as belonging to the ethnicity of the host country and being transferred by an organization to the host location on a long-term assignment or permanent transfer (Thite et al., 2009). Most often (but not always), EHCOs are thought of as originating from an emerging economy, who study or work in a developed country and then return to the emerging economy to plug important skills gaps in those countries (Borjas and Bratsberg, 1996; Chacko, 2007; Harvey, 2009; Saxenian, 2006). Tung (2008) and Tung and Lazarova (2006) conceptualize EHCOs as ex-host country nationals (EHCNs) and distinguish three types: those who have spent a considerable period of time outside their home country, being heavily involved in international labour markets, and then return (Chacko, 2007); those who have lived most of their life outside the home country, and then return (Zweig et al., 2004); and those who were born and raised abroad (often by first-generation immigrants or expatriate parents) and who then return to their 'homeland' for the first time (Jain, 2012). None of these assigned expatriate types should be confused with 'returnees' and those engaging in 'return migration' (Comay, 1971; Dustmann and Weiss, 2007; King, 2000), which are terms reserved for migrants. EHCOs often have dual citizenship of the home and host locations, or permanent residency status in the home location from where they are being sent, with citizenship in the host location, which causes confusion as to whether they meet the 'no citizenship' critieria in our definition and can, in fact, be conceptualized as business expatriates. In practice, business expatriate status is determined by the sending organization; for example, the former (EHCOs with dual citizenship) usually expatriate to the host country utilizing the passport of the country from where they have been sent, which then entitles them to be paid on enhanced terms and conditions (if offered) to recognize their being 'foreigners' in that country. In the latter, the sending organization may decide to retain the EHCO's 'foreign' status even if they are officially entering the host country as a citizen of that country.

Self-Initiated Expatriates

In contrast to research about AEs, self-initiated expatriation has emerged as an alternative and increasing pattern of international work among business expatriates (Cerdin and

Selmer, 2014; Doherty and Dickmann, 2013; Doherty et al., 2013; Dorsch et al., 2012; Thomas et al., 2005; see Chapter 9 in this volume for an overview). Self-initiated expatriates (SIEs) are characterized more broadly as 'individuals who initiate and usually finance their own expatriation and are not transferred by organizations. They relocate to a country of their choice to pursue cultural, personal, and career development experiences, often with no definite time frame in mind' (Shaffer et al., 2012, p. 1286).

Although identified only recently in academic research (Suutari and Brewster, 2000), they have been around for thousands of years. The past decade has spawned a mass of research on SIEs, leading to two summary books (Andresen et al., 2012a; Vaiman and Haslberger, 2013), a special issue (Doherty et al., 2013) and a dedicated conference (May 2015, Toulouse). Research on SIEs has labelled them simultaneously as self-selecting expatriates (Richardson and McKenna, 2002), self-directed expatriates (Felker, 2011; Richardson, 2006; Richardson and Mallon, 2005; Richardson and McKenna, 2006), self-initiated foreign workers (Harrison et al., 2004), independent expatriates (McKenna, 2010), independent internationally mobile professionals (McKenna and Richardson, 2007; Tharenou, 2013) and inter-organizational SIEs (inter-SIEs) (Andresen et al., 2014), with their experiences being described as self-initiated foreign assignments (Suutari and Brewster, 2000) and self-initiated foreign experiences (Myers and Pringle, 2005).

Shaffer et al. (2012) included in their conceptualization the early research that defined SIEs as being typically of a younger age and primarily motivated to move abroad more by curiosity and perceived adventure (tourism, travelling, backpacking) than by pragmatic career capital development concerns (see Inkson and Myers, 2003; Meyskens et al., 2009; Thorn, 2009). The term 'overseas experience' was used to refer to the temporary move of young people to different countries primarily for adventure and to explore the world and other cultures, rather than to gain international career experience (Inkson et al., 1997). If engaging in work while abroad, these SIEs are often remunerated 'off the books', as is the case with many young people and migrant hopefuls whose 'cash jobs' and unskilled temporary work often do not suit their qualifications, or provide little career value (see Al Ariss and Syed, 2011; Inkson and Myers, 2003), but who work in order to stay alive and to support their travels (Lauring et al., 2014). Many of these groups do not fit our definition of business expatriates as they are not moving abroad for work.

Recent work on SIEs has included those who go abroad primarily for the perceived value of international work experience to their long-term personal and professional development (Doherty and Dickmann, 2013; Shaffer et al., 2012; Tharenou, 2013), or who do so initially as an AE and then transition into SIE status (Altman and Baruch, 2012; Andresen et al., 2014; McNulty and Vance, 2017). This is in line with research showing that about half of SIEs work for MNEs and global companies (e.g., Froese and Peltokorpi, 2013; Jokinen et al., 2008; Tharenou, 2013), and that organizations deliberately seek to hire them as they can overcome some of the difficulties of staffing with PCNs and HCNs (Tharenou, 2013; Tharenou and Harvey, 2006). Notably, excluded from recent studies of SIEs are other skilled occupations that fall under the remit of 'business employment' but whose work is not necessarily in corporations (see Bozionelos, 2009; Brown and Connell, 2004; see also Andresen and Hippler, 2016 for a recent critique). Critically, while much of this newer literature assumes that SIEs are professionals seeking work and/or career opportunities at a managerial level (Andresen et al., 2014; Cerdin and Pargneux, 2010; Crowley-Henry, 2012; Doherty and Dickmann, 2013; McKenna and

Richardson, 2007; Tharenou, 2013), studies continue to use the all-encompassing term 'SIE' to describe these individuals, with its implied and conceptualized meaning of anyone who moves abroad independently whether for professional or other reasons, thus resulting in the relocation-for-work distinction not being made clear. Because the meaning is implied, it results in terminological confusion about the SIE concept in the context of business employment.

Recent developments have further added to the confusion. Cerdin and Selmer (2014), although now conceptualizing employment as a criterion, continue to use the original 'SIE' term to refer to those who are employed as well as those who are not employed. Others (e.g., Howe-Walsh and Schyns, 2010) have done the same and, while using employment as a defining criterion, have also delineated SIEs according to two types – that is, private SIEs versus career SIEs – but with poor theorizing to explain it. To overcome the confusion, we characterize SIEs who work for MNEs and global companies as 'employed SIEs', as distinct from the more general term 'SIEs' which refers to anyone who relocates abroad independently whether employed or not, or for private or career reasons. The employment criterion for employed SIEs refers to their employment status by an organization at the time at which they are being studied, thus distinguishing between those who may be career SIEs but who never (intend to) gain employment, versus those who are actually employed. Employed SIEs engage in some form of employment as appropriate to their occupation, being legally employed on a temporary basis in a country they view as hosting their career.

Unlike many AEs, employed SIEs tend to be uninhibited by organizational and occupational constraints, and are motivated to take charge of their careers rather than to wait for their organization to arrange for an appropriate career opportunity involving international work experience (Andresen et al., 2012a; Cerdin and Pargneux, 2010; Jokinen et al., 2008; Richardson and Mallon, 2005; Tharenou and Caulfield, 2010). Employed SIEs have high agency and are usually externally recruited (Tharenou, 2013), taking control of their careers outside the confines of the organization and thereby abandoning corporate intervention and security in favour of autonomy and flexibility (Parker and Inkson, 1999). Unlike migrants, employed SIEs do not intend to stay permanently, even if their stay abroad exceeds the typical duration of an AE stay.

The consulting field, as so often happens, has added to the terminological jangle factor by recently conceptualizing the employment of SIEs as 'perma-pats' (Dalai, 2015) in a low-cost process known as 'expatshoring' (Harper, 2012), that is, when a company employs skilled and highly qualified expatriate professionals already living in a targeted host country but who originate from the company's home country and thus share the same language and culture. Other recent conceptualizations of employed SIE types include:

- Foreign executives in local organizations (FELOs): foreign individuals at executive level who hold local managerial positions supervising HCNs in local organizations where they have their headquarters (Arp, 2014; Arp et al., 2013). These might include the much-studied cohort of academic expatriates (Trembath, 2016), particularly those in executive administrative roles.
- Localized expatriates (LOPATs): defined as AEs who, after completing a home country-based long-term assignment contract then transition to full local terms and

conditions in the host country either as directed by the employer or at their own request (McNulty, 2013; Tait et al., 2014).

● Permanent transferees (PTs), also known as 'one-way movers' or 'international one-way transfers' (AirInc, 2016): defined as employees who resign from the home country office and are hired by the host country office of the same MNE, but for which there is no return (repatriation) to the home country, no guarantee of company-sponsored reassignment elsewhere, and only local terms and conditions offered in the host country (Tait et al., 2014; Yates, 2011).

We add to the list of employed SIE types expatriates of host country origin (EHCOs) who, whilst having been traditionally conceptualized as AEs, could also be SIEs in the form of self-initiated repatriates (SIRs) (Andresen and Sebahate, 2015; Begley et al., 2008) undertaking self-initiated repatriation (Tharenou and Caulfield, 2010) by returning to their home country of their own volition.

Not Business Expatriates: Sojourners, Migrants and Business Travellers

As mentioned earlier, the purpose of this chapter is to determine who is and who is not a business expatriate. Doing so leads us to exclude from our theory-specific statement about business expatriates three other categories of international workers that have commonly been confused with business expatriates: sojourners, migrants and business travellers. In this section, we use the dimensions of time and purpose to illustrate why sojourners, migrants and business travellers are not business expatriates. While we do not deny that there is value in exploring international movements that take forms other than business expatriation, a clear distinction between these four categories is necessary in order to achieve construct clarity about the business expatriate concept.

Sojourners

Sojourners were the basis of early academic research on expatriates, which began during the 1960s. Sojourners are people who voluntarily and temporarily travel to a foreign country for a non-business purpose such as short-term unpaid missionary and charity work, tourism, exile, education, retirement, or simply to see and experience the world (Brein and David, 1971; Church, 1982; Green, 2009; Lorente et al., 2005; Navara and James, 2002). Sojourners may work – in legal or illegal paid employment – but do so predominantly, and often intermittently, to fund their travels and/or stay, as in the case of a gap year before or after university, or during retirement. Like expatriates, sojourners do not travel abroad for the purposes of permanent settlement. Sojourners include students studying abroad who may do so for a few weeks, a semester or their entire degree (De Verthelyi, 1995; Hao and Wen, 2016; Pedersen et al., 2011; Pitts, 2009). The latter is widespread and is particularly common among expatriate children who return to their 'passport country' to complete their university education (Peterson and Plamondon, 2009; Quick, 2010). Student mobility remains an under-researched area, and while students have been simultaneously conceptualized as both migrants and expatriates (Al Ariss, 2010; de Wit et al., 2008), and expatriates and sojourners (Pedersen et al., 2011), more clarification is needed. Sojourners continue to be confused with business expatriates (Furnham, 1987; James et al., 2004; Lance and Richardson, 1988). For international

business and IHRM researchers, however, the fact that they are not employed in any meaningful way puts them outside the scope of our interest as business expatriates.

Migrants

Also falling outside our scope of interest are migrants. The distinction between expatriates and migrants in the field of expatriate studies has been controversial and murky (see Al Ariss and Syed, 2011; Andresen et al., 2012b; Andresen et al., 2014), especially in regions such as the European Union where the free movement of labour is a foundational principle (Brewster and Harris, 1999; Favell, 2004; Smith and Favell, 2006; Salt and Millar, 2006). In expatriate studies, definitions of migration are often drawn widely so as to include expatriates (Andresen et al., 2014). Examples are Agozino (2000), Boyle et al. (1998), Briscoe et al. (2009), Wiles (2008) and United Nations (1998, p. 17), which defines migrants as 'any person who changes his or her country of usual residence', with the 'country of usual residence' representing the place where the person has the centre of their life. It has been argued that migrants may be temporary or permanent stayers (Borjas and Bratsberg, 1996; Castles, 2000; Comay, 1971; King, 2000; Lavenex, 2006; Yeoh, 2006), further adding to the confusion, as migrants can now also at the same time be expatriates. The confusion is not limited to our field. The migration literature provides even less clarity where, as the following example shows, the terminology used to distinguish expatriates from migrants is just as unclear:

> This paper focuses on case studies of long-term Western settlers – those in the city more than five years – and how they situate themselves in the city through their 'narratives of emplacement' or stories of a personalised relationship to the city. Settler stories reference both a postcolonial nostalgia for the lifestyles of the 1930s Shanghailanders, and a newer post-socialist model of cosmopolitan citizenship for mobile urban elites, related to the state-sponsored ideal of the 'New Shanghainese.' Taken as a whole expatriate narratives of emplacement construct an idealised image of a culturally cosmopolitan, locally integrated and economically successful immigrant entrepreneur. Few settlers may actually live up to this ideal, but these narrative strategies allow settlers to construct imagined links to a place and polity that substitute for more substantive forms of urban citizenship, while excluding other categories of migrants (Farrer, 2010, p. 1211)

Generally the management literature has preferred to have single terms for single phenomena, and has defined migrants as people who leave their home country on a long-term to permanent basis in order to live and work abroad, most with the specific intent of attaining citizenship of, and settling in, a new country (Al Ariss and Syed, 2011; Berry, 1997; Castles et al., 2013; Massey and Bartley, 2006; Waldinger, 2008). They are often (but by no means always) motivated by the push of economic and socio-political necessity (Khosa and Kalitanyi, 2015; Saxenian, 2002; Tharmaseelan et al., 2010). They may be unskilled (poor, uneducated, as refugees) or skilled, highly educated and experienced individuals (Al Ariss and Crowley-Henry, 2013; Al Ariss and Syed, 2011; Cerdin et al., 2014; Smith and Favell, 2006; Findlay et al., 1996; Iredale, 2001). They may be lifestyle migrants, for example US veterans relocating to the Philippines or Mexico for cheaper healthcare (McNulty et al., 2016); or retirement and leisure migrants, very common now in Europe where pensions are portable and comparatively generous in Northern Europe, whilst the weather and lifestyle that can be bought with them are much better in the warmer Southern European states (Butler and Richardson, 2013; King et al., 2000;

Knowles, 2005; Oliver, 2012). Migrants may also be non-privileged (economic) migrants (or refugees) at the bottom of the economic scale. These latter, however, have been largely ignored in the business literature, which concentrates on highly skilled and privileged migrants, often discussed in terms of brain drain and brain gain (see Al Ariss and Syed, 2011). Again, the terminology describing highly skilled migrants is confusing, referring to them simultaneously as transnational elites (Beaverstock, 2002, 2005; Willis et al., 2002), transnational knowledge workers (Colic-Peisker, 2010), skilled transients (Findlay, 1988), qualified immigrants (QIs) (Cerdin et al., 2014; Zikic et al., 2010) and immigrant professionals (Batalova and Lowell, 2006).

In principle the distinction between business expatriates and migrants is clear: unlike expatriates, migrants, in the broadest and continuing definitions of the concept, intend to move to another country on a permanent basis (Al Ariss and Ozbilgin, 2010; Hugo, 2002; Iredale, 2001; Yeoh and Lin, 2013). In practice, the boundaries are more fungible and, like the distinctions between AE and SIE categories, individuals may move between them. Some AEs exactly fitting the definition decide to stay on indefinitely in the host country after their assignment as localized expatriates (by negotiating a non-expatriate or significantly reduced expatriate contract with their existing employer or a new one) (McNulty, 2016; ORC Worldwide, 2004), while others stay on permanently as skilled migrants. Al Ariss and Ozbilgin (2010) found, for example, that many SIEs stay in a new country on a permanent basis and become migrants. Conversely some migrants, although intending to stay permanently, return home within a short period (Harvey, 2009; Toren, 1976). Further muddying the waters are studies that show, for example, that returnees (reverse migrants) often consider re-expatriation despite holding better professional positions in their home country as a result of their international or study abroad experiences (Gama and Pedersen, 1977; Gill, 2005; Tung, 2007), while companies in Asia will consider relocating again an expatriate who has been localized to host country conditions (Mercer, 2010).

It has been argued that migration, once conceived as permanent, has increasingly become a temporary condition (Borjas and Bratsberg, 1996; Findlay, 1988; Sayad, 2004), but if we are to be clear about our terms we have to be clear about our constructs, even as we accept that individuals may move between the categories. The key distinction between migrants and AEs is much clearer than between migrants and SIEs: in both instances, however, a migrant does not conceive of a host country as providing only a temporary stay, as do business expatriates; rather, the new country is intended to become their home country. Business expatriates, on the other hand, perceive their stay as temporary and do not view the host country as their permanent home.

Business travellers
In contrast to sojourners, business travellers travel to a foreign country for a purpose determined by their work role (Nicholas and McDowall, 2012; Suutari and Brewster, 2009; Suutari et al., 2013), but they only stay there for a short time, usually ranging from a few hours and overnight to a few days or weeks (see Chapter 14 in this volume). Work is defined in the context of legal paid employment for career purposes. This includes those typically conceived as executives travelling in business class and staying in good-quality hotels whilst they visit subsidiary operations of their company, or customers or suppliers. The defining characteristic of business travellers is that they and/or their bosses believe that this is the best way to get their work done, although often they may have their own

budgets and considerable autonomy in deciding whether or not they travel or how much travelling they do. Importantly, unlike business expatriates, business travellers go abroad, often at short notice, and maintain their family and personal lives in their nominated home country.

While business travellers, like sojourners, have existed for centuries, developments in international transport, particularly in the airline industry, have made such travel much more cost-efficient, mainly in terms of executives' time. In Europe, where there are many relatively rich countries with good transport links in a comparatively small geographical space, international business trips are common (Beaverstock et al., 2010; Demel and Mayrhofer, 2010; Westman and Etzion, 2002), as is cross-border daily or weekly commuting: for example, high-skilled workers commuting between London and Paris, or Brussels and Rotterdam (Green et al., 1999; Huber, 2014); and low- and unskilled factory and domestic workers and manual labourers commuting daily across borders in Europe, as well as between Malaysia and Singapore, Hong Kong and China, or Mexico and the USA (Huber and Nowotny, 2013).

Business travellers have only recently been conceptualized in the management literature (Mayrhofer et al., 2012; Mayrhofer et al., 2008; Meyskens et al., 2009). However, as in other categories of international workers, terminological and conceptual confusion persists about who they are. For example, business travellers have been segregated according to who initiates the business trip (company or self), being referred to as assigned travellers when they are sent by the company in which they are employed (Andresen et al., 2014), versus globetrotters (Baruch et al., 2013) and self-initiated travellers (Andresen et al., 2014) when they self-initiate their international work, for example as independent consultants. These categories may complete some academic box-creation exercise, but what they mean in practice is, erring on the side of generosity, unclear.

Different terminology to mean the same thing has likewise contributed to construct proliferation about the business traveller concept, with them being simultaneously referred to as: (1) frequent business travellers (Baker and Ciuk, 2015; Demel and Mayrhofer, 2010), frequent flyers (Sparrow et al., 2004), international business travellers (Andresen and Bergdolt, 2016; Beaverstock et al., 2010; Gustafson, 2014; Shaffer et al., 2012; Striker et al., 1999) or even domestic international managers (Tharenou and Harvey, 2006); (2) extended business travellers (KPMG, 2008) and flexpatriates (Mayerhofer et al., 2004a; Mayerhofer et al., 2004b); and (3) international commuters, that is, employees who retain a permanent residence status in their home country but work unaccompanied by family members on a semi-permanent to permanent basis in another country (Brewster et al., 2001; Suutari and Brewster, 2009). International commuters may just be people who work half an hour from the family home, but that happens to be across a border; relatively common in Europe, for example. They may be people who leave their home for rather longer periods of time but still return home on a frequent basis, perhaps travelling to work on a Monday and being home on a Thursday or Friday to spend the weekend there. This can be the case in high-stress expatriation where families stay in safer countries whilst the expatriate spends days or weeks in a dangerous one nearby. The gaps may be longer, as per the typical 30-day on–off arrangements in the oil and gas industry (Danehl, 2015), or there may be some other system of rotational assignees (Baker and Ciuk, 2015). The literature is generally unspecific about the definitions of these various kinds of business traveller, often conflating or confusing them (see Chapter 14 in this volume for an overview).

CONCLUSION

We began this chapter by suggesting that the field of expatriate studies needs a new paradigmatic focus as to the meanings of the term 'business expatriate' if it is to continue to develop in a way that helps researchers and practitioners to increase their understanding of the phenomenon. The research base defining business expatriates is still relatively small (Andresen et al., 2014; Aycan and Kanungo, 1997; Harrison et al., 2004; Haslberger et al., 2014; Shaffer et al., 2012), with much of the evidence of a descriptive nature in terms of expatriates' experiences (see the review by Shaffer et al., 2012), or with theory developed (Kraimer and Wayne, 2004; Yan et al., 2002) but often untested. Despite the enormous empirical literature on business expatriates (see reviews by Andreason, 2008; Black and Mendenhall, 1990; Littrell et al., 2006; Mol et al., 2005; Thomas and Lazarova, 2006), few studies have attempted to address how business expatriates are, or could be, defined in comparison to other concepts, with the exception of a recent push to distinguish SIEs from other types of international workers, such as AEs (Tharenou, 2013), albeit with an emphasis only on how to broadly define AEs and SIEs without taking into account their many types.

By proposing a clarification of the term 'business expatriate' and including within it AEs, SIEs and other examples of people moving to another country to work for a limited amount of time (see Appendix 2.1 for a detailed glossary of terms), we hope to have contributed to cutting through some of the confusion and to creating something to chew on beyond the existing 'alphabet soup' of terminology. We are firmly of the belief that without construct clarity, studies of expatriates (and expatriation more broadly) will fail to make any significant progress. We are conscious of the limited number of articles on expatriates of the quality necessary for publication in top academic journals, and we wonder whether this is due, in part, to the lack of a theory-specific statement about who business expatriates are, which we have attempted to address here. We are undoubtedly more concerned, however, that without clearer definitions as to what we are studying, and perhaps far more importantly what we are not studying, the field of expatriate studies may be sabotaging its own efforts to add to new knowledge about this increasingly important segment of the global labour pool.

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APPENDIX 2.1: GLOSSARY – CLEAR AND ACCURATE TERMS ABOUT EXPATRIATES

Note: Numbers denote the 'best example' citation and correspond to references in Appendix 2.2.

assigned expatriate (AE) – Employee temporarily transferred abroad by their organization, which arranges and supports the move, to work in a foreign subsidiary for an organizational goal.[72] Conceptualized as a broader type of business expatriate who engages in assigned expatriation constituting of five specific subtypes that vary according to their purposes and country of origin: parent country nationals (PCNs), third country nationals (TCNs), inpatriates, some expatriates of host country origin (EHCOs) and short-term assignees (STAs).[46] *Also known as:* expatriate,[20] organizational expatriate (OE),[30] organization-assigned expatriate (OE),[46] company-assigned expatriate (CAE),[71] traditional expatriate,[39] corporate expatriate,[61] corporate executive,[78] corporate manager,[33] international executive,[14] expatriate employee,[14] managerial expatriate,[69] expatriate manager,[36] conventional expatriate,[3] intra-SIE,[4] propatriate/glopatriate,[49] business expatriate,[46][59] international manager,[44] international assignee,[54] long-term assignee,[47] international personnel,[51] internationally mobile manager,[5] company-backed expatriate.[23]

business expatriate – Legally working individual who resides temporarily in a country of which they are not a citizen in order to accomplish a career-related goal, being relocated abroad by an organization, or by self-initiation, or directly employed within the host country.[46]

commuter – Employee who retains a permanent residence status in their home country but works unaccompanied by family members on a semi-permanent to permanent basis in another country. 'Work' includes crossing an international border daily (relatively common in Europe and parts of Asia), weekly (travelling to work on a Monday and being home on a Thursday or Friday), or longer periods away due to high-stress expatriation where a family stays in a safer country whilst the expatriate spends days or weeks in a dangerous one nearby (common in intergovernmental organizations).[64] *Also known as:* international commuter/rotator,[21] rotational assignee (e.g., 30-day on–off arrangement).[8]

expatriate of host country origin (EHCO) – Permanent resident or citizen of the parent country but belongs to ethnicity of host country and is internationally hired or transferred by the parent country organization to the host location on a temporary assignment or permanent transfer.[74] EHCOs frequently hold dual citizenship of the parent and host country; they will elect whether to expatriate on citizenship versus non-citizenship status. Most often (but not always), an EHCO is thought of as originating from an emerging economy to study or work in a developed country, and then returning to the emerging economy to plug an important skills gap in that country. *Also known as*: ex-host country national (EHCN),[79] ethnically similar/ethnically different expatriate,[27] returnee,[40] sea turtle.[32]

foreign executives in local organizations (FELOs) – Foreign individuals at executive level who hold local managerial positions supervising HCNs in local organizations where they have their headquarters.[6][7]

global careerist – AE or SIE engaging in sequential assignments from one foreign location to another with or without first repatriating by stringing together reassignments into meaningful sequences for their professional benefit.[66] *Also known as*: international itinerant,[9] career expatriate,[75] serial expatriate,[13] repeat expatriate,[52] highly mobile.[29]

host country national (HCN) – Citizen of the host country employed locally.[53][76][80] *Also known as:* locals, domestic employees.

inpatriate – HCNs and TCNs of an MNE's foreign subsidiary sent to the HQ operation to learn the organizational culture, or to learn specific competencies to take back to their subsidiary, or to bring knowledge of the subsidiary and its issues and opportunities to the HQ.[55] *Also known as:* impatriate,[2] reverse expatriate.[12]

international business traveller – A person who travels to a foreign country for a purpose determined by their work role but only stays there a short time, usually ranging from a few hours and overnight to a few days or weeks. Work is defined in the context of legal paid employment for career purposes. They often go abroad at short notice, and maintain their family and personal lives in their nominated home country.[64] *Also known as:* extended business traveller,[43] frequent business traveller,[22] flexpatriate,[45] assigned traveller,[4] self-initiated traveller (e.g., independent consultant),[4] frequent flyer,[62] domestic international manager.[73]

localized expatriate (LOPAT) – An AE who, after completing a home country-based long-term assignment contract, transitions to full local terms and conditions in the host country either as directed by the employer or at their own request.[48][68]

migrant (skilled and unskilled, including refugees) – Person who leaves their home country on a long-term to permanent basis in order to live and work abroad, most with

the specific intent of attaining citizenship of, and settling in, a new country. They are often (but by no means always) motivated by the push of economic and socio-political necessity. May be skilled (highly educated) or unskilled (poor, uneducated, as refugees).[1][16] *Also known as:* transnational elites,[81] transnational knowledge workers,[19] skilled transients,[28] qualified immigrants (QIs),[82] immigrant professionals.[11]

overseas experience (OE) traveller and tourist – Typically a young person who travels to different countries primarily for adventure (tourism, backpacking) and to explore the world and other cultures, rather than to gain international career experience. If engaging in work while abroad, they are most commonly remunerated 'off the books' in 'cash jobs' and unskilled temporary work that usually does not suit their qualifications or provides little career value, but which supports and funds their travel.[41][42]

parent country national (PCN) – Citizen sent from the parent company headquarters country to a foreign subsidiary. Imbued with the headquarters culture and understanding HQ ways of operating. Predominantly used for the purposes of control and coordination. Typically expected to return to the parent company headquarters.[25][37][77] *Also known as:* traditional expatriate, corporate expatriate (*see AE above*).

permanent transferee (PT) – Employee who resigns from the home country office and is hired by the host country office of the same MNE, but for whom there is no return (repatriation) to the home country, no guarantee of company-sponsored reassignment elsewhere, and only local terms and conditions offered in the host country.[68] *Also known as:* one-way mover.[26]

self-initiated expatriate (SIE) – An individual who initiates and usually finances their own expatriation and is not transferred by an organization. They relocate to a country of their choice, or to an organization of their choice based in another country, to pursue cultural, personal and career development experiences, often with no definite time frame in mind.[24][61] *Also known as:* self-initiated foreign work experience,[63] self-selecting expatriate,[58] self-directed expatriate,[56] self-initiated foreign worker,[35] independent expatriate,[57] independent internationally mobile professionals,[71] inter-organizational SIEs (inter-SIEs).[4]

self-initiated expatriate (SIE), employed – Broadly defined in two ways: (1) expatriates who self-initiate their international relocation, with the intentions of regular employment and temporary stay and, arguably, with skills or professional qualifications;[17] or (2) professionals and managers who, unsupported by an organization, expatriate to seek work in a host country for an indefinite period, usually more than a year.[71] The defining criterion is organizational employment irrespective of the individual relocating abroad to take up the job (hired internationally) or as an international local. *Also known as*: international local hire,[26] foreign local hire,[26] locally hired foreigner/local foreign hire,[60] local hire,[18] inter-SIE,[4] drawn expatriate.[4]

short-term assignee (STA) – People engaged in an international assignment lasting up to one year. The cut-off point is usually six months, because after that, in a lot of countries, an STA becomes liable to questions about where they should be paying tax, national insurance and other fiscal requirements.[65][67] *Also known as*:

secondees – people asked by the organization to temporarily relocate to another department for a short period of time;[10] or talent swaps – employees in the same company from different countries temporarily switch jobs for up to a year.[50]

sojourner – Person who voluntarily and temporarily travels to a foreign country for a non-business purpose such as short-term unpaid missionary and charity work, exile, education, retirement, or simply to see and experience the world.[31] May work in legal or illegal paid employment but does so predominantly, and often intermittently, to fund their travels or stay (as in the case of a gap year before or after university, or during retirement). A sojourner does not travel abroad for the purposes of permanent settlement. Includes a student studying abroad who may do so for a few weeks, a semester or their entire degree.[34]

third country national (TCN) – Sent by the central IHRM department (or its regional equivalent) but originates from neither the parent country headquarters location nor the host country where they are employed, but a third country where they have lived either temporarily or permanently before being internationally hired or sent to the host country.[38][53][80]

virtual workers and global domestics – An employee who remains in their home country but has responsibilities and/or interactions with individuals in or from other countries. A virtual worker by extension communicates mainly through information and communication technologies with team members in other countries.[70] *Also known as:* virtual expatriates,[20] global virtual team members,[61] domestic international managers,[73] global managers with worldwide coordination responsibilities.[15]

APPENDIX 2.2: GLOSSARY REFERENCES

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