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## Self-Initiated Expatriates

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# SELF-INITIATED EXPATRIATES

Jan Selmer, Vesa Suutari and Chris Brewster

## 1. Introduction and definitions of self-initiated expatriates

There have been self-initiated expatriates (SIEs) throughout history: the early Christian apostles, the Vikings, the first Chinese and European explorers were all SIEs. Some of the very earliest studies of expatriates in the business and management literature examined academics, missionaries and aid workers – all archetypical SIEs (Bennett, 1985; Hautaluoma & Kaman, 1975; Henry, 1965; Lysgaard, 1955; Mischel, 1965; Taylor, 1968) but that early interest was quickly succeeded by a focus on business expatriates (McNulty & Selmer, 2017). These were assigned expatriates (AEs), often from large corporations. Basically, all academic research about expatriates from the 1970s onwards involved (mostly) men assigned by large parent multinational corporations to subsidiary units in foreign host locations (Selmer, 2017). However, as we moved into the twenty-first century, researchers recognized that not all expatriates were AEs - some were not assigned by any organization (Suutari & Brewster, 2000). Although the terminology was initially diverse ranging from ‘international itinerants’ (Banai & Harry, 2004) to ‘independent internationally mobile professionals’ (Richardson & McKenna, 2002), eventually, the current denomination ‘self-initiated expatriate’ with the acronym SIE became widely used (Cerdin & Selmer, 2014; Selmer, Andresen & Cerdin, 2017).

Scholars agree that SIEs are individuals who personally take charge of their careers without the direct support of an organization and who themselves make the decision to live and work abroad (Dorsch, Suutari, & Brewster, 2013; Selmer & Luring, 2010; Tharenou & Caulfield, 2010). They leave their home country for a job in the host location, which they may have acquired either before leaving or after arrival in the new country (Cerdin & Selmer, 2014). Hence, the key distinction between SIEs and AEs is the initiative for the move: For SIEs, the initiative for leaving the home country comes from the individual, not the employer (Andresen & Margenfeld, 2015; Richardson & Mallon 2005).

An overview of 35 different SIE definitions applied over the ten years between 2005-2015 was offered by Cerdin & Selmer (2014). The construct is not always clear: For example, the same author may use different definitions of a SIE in the same publication (Howe-Walsh and Schyns, 2010; Jokinen et al., 2008). Worse, the most obvious and widely accepted criterion, relocating internationally on one's own initiative, is not present in all definitions. For example, Cao (2013) refers to 'freedom of choice', which is not exclusive to SIEs. Therefore, attempts have been made to create more conceptual clarity for the benefit of academic research on SIEs. One such definition, involving three characteristics of SIEs, was offered by Selmer, Andresen & Cerdin (2017, p.194):

“1. SIEs are expatriates who self-initiate their international relocation across national borders, that is, the first key binding activity to move internationally is solely taken by the individual and not by any organization (Andresen et al., 2014).

2. Self-initiation reflects a personal initiative, which typically involves several indicative behaviors such as being a self-starter, proactive and persistent. Depending on the SIE's motive to relocate, personal initiatives relate mainly to their international career or private life.

3. By relocating across international borders, SIEs change their dominant place of residence (center of one's life; Andresen et al., 2014).”

Another definition of SIEs was proposed by Cerdin & Selmer (2014, p.1281):

“This article defines who an SIE is according to four criteria which must all be fulfilled at the same time: (a) self-initiated international relocation, (b) regular employment (intentions), (c) intentions of a temporary stay, and (d) skilled/professional qualifications.”

Although both definitions emphasize self-initiated international relocation, the latter definition may be regarded as more precise and also more inclusive, since the dimension of time is involved. This resonates well with contemporary academic research attempting to study the context of SIEs by recognizing space, time and institutions (Andresen, Brewster & Suutari, 2021). Although the final requirement (d) by Cerdin & Selmer (2014) reflects the literature up to that time, it excludes the mass of SIEs, those in low status positions (Haak-Saheem & Brewster, 2017; Haak-Saheem, Brewster & Luring, 2019). As discussed below in this chapter, despite low status expatriates being such a large group, scholars have only recently begun to investigate them.

Discerning readers will note that to this point attention has been focused on clarifying the concept of SIEs. We do not apologize for that, there is too much sloppy thinking in management and industrial and organizational psychology that fails to do so, but from here on in it will be noticeable that the subject is empirically driven. There are, as we will note towards the end of the chapter,

increasing attempts to explain SIEs in more sophisticated analyses that are slowly building up a theoretical base for the subject, but it remains the case that to date the bulk of the work has been concentrated on establishing the territory. The more sophisticated analyses have addressed different issues and addressed each one from different perspectives, so that there remains considerable space for developing a full-scale ‘theory’ of self-initiated expatriation.

## 2. Distinctive characteristics of self-initiated expatriates

Just to emphasize our definition, it is worth separating SIEs from other groups that they have, either conceptually or empirically, been confused with. For example, SIEs (there for the purpose of work) are distinct from students or gap year travelers (for which, see Inkson, Arthur, Pringle & Barry, 1997); SIEs (who live in their host country) are distinct from international business travelers; and SIEs (who are temporarily located in the host country) are distinct from immigrants who intend to settle in their new country.

They are also distinct from AEs, in terms of motivation, their personal characteristics and their experiences during the expatriate cycles (Table 1). The extant research tells us that, compared to AEs, SIEs tend to be younger, more frequently female, more often single and, where they are a couple, more often accompanied by a working partner, they are less likely to have children than AEs, and more likely to have international experience. SIEs tend to be more proficient in the language of their host country than AEs, to have a more stable career orientation, perhaps because of their personal investment in their career, leading to a career progression sustained over time.

**Table 1: Personal Characteristics<sup>1</sup>**

Characteristic	SIEs vs. AEs	Source(s)
<i>Inherent Demographics</i>		
Slightly younger	SIEs > AEs	Suutari & Brewster, 2000; Peiperl et al., 2014; Cerdin & Le Pargneux, 2010; Dickmann et al. 2018
More women	SIEs > AEs	
Older	AEs > SIEs	
More males	AEs > SIEs	

<i>Acquired Demographics</i>		
More singles	<b>SIEs &gt; AEs</b>	Suutari & Brewster, 2000; Peiperl et al., 2014; Cerdin & Le Pargneux, 2010
Married or living with a partner	<b>AEs &gt; SIEs</b>	
Accompanied with partners working abroad	<b>SIEs &gt; AEs</b>	
Accompanied with partners not working abroad	<b>AEs &gt; SIEs</b>	
Number of children	<b>AEs &gt; SIEs</b>	
Proficiency in host country language	<b>SIEs &gt; AEs</b>	Froese & Peltokorpi, 2013
Previous work-related international experience	<b>AEs &gt; SIEs</b>	Jokinen et al., 2008; Alshahrani & Morley 2015
Previous nonwork-related international experience	<b>SIEs &gt; AEs</b>	Alshahrani & Morley 2015
International mobility during childhood	<b>SIEs &gt; AEs</b>	
Personal contacts at HQs	<b>AEs &gt; SIEs</b>	Jokinen et al., 2008; Dickmann et al., 2018; Furusawa & Brewster, 2018
Personal contacts at host location	<b>SIEs &gt; AEs</b>	
Stable career orientation	<b>SIEs &gt; AEs</b>	Biemann & Andresen, 2010
Career orientation decreases with age	<b>AEs &gt; SIEs</b>	
Personal investment in career	<b>SIEs &gt; AEs</b>	
Career progression sustained over time	<b>SIEs &gt; AEs</b>	

<sup>1</sup>Adapted and extended after Farcas & Gonçalves (2016)

Table 2 displays the intergroup differences between SIEs and AEs during the expatriation cycle, from home country to the host country and then to the end of the stay in that country (an either a return back home or moving on to another country). SIEs tend to contemplate expatriation either because they have an interest in internationalism or they are experiencing a poor employment situation at home, or they have found an attractive job in the international market. In general the individual and their family bear the costs of the international move. AEs cost their employer a lot, so employers (mostly) only send AEs to do ‘mission-critical’ roles as technical experts or managers. SIEs, by contrast may be found at any level of the organization.

For SIEs, who themselves choose which countries they will go to, host country reputation becomes important; AEs are more concerned with career factors in deciding their destination. SIEs may have been chasing a job in an international organization or may have been in long discussions with family members, selecting a country, planning the move, checking out the websites, talking to

people from those countries and to local embassies for months or years, while AEs typically move shortly after being told they have been selected for a foreign assignment.

During their time abroad, AEs typically enjoy specified in-country support from the assigning organization in the home country, while SIEs often have only the same support as locals, unless they get recruited into an organization specifically as a boundary-spanner between HQ and the local operations (Furasawa & Brewster, 2018). SIEs are, almost by definition, more commonly employed in the public sector or set up as entrepreneurs while although there will be AEs who are sent by public sector employers (in the civil and armed services) they are mostly employed in the private sector. SIEs usually work at lower organizational levels than AEs who, as we have noted, tend to be employed in more senior positions. It is not unusual for SIEs to be undertaking relatively low status, casual roles, often below their qualification levels (such qualifications not being recognized by local employers) and their capabilities, while AEs frequently have challenging, broad roles, befitting their status. Organizations employing SIEs are often local businesses or smaller international or foreign private companies, while AEs work in the local subsidiary for, often, giant multinational organizations. Given their wide spread of positions, SIEs have extensive variations in salary and other terms and conditions of employment. AEs often enjoy additional competitive compensation packages, including, for example, assignment insurance, overseas premiums and house and education allowances. Hence, the research (Froese & Peltokorpi, 2013) tells us that comparing similar-level expatriates, AEs may be more satisfied with their job than SIEs. However, without time-determined expatriation contracts, SIEs tend to spend a longer time in the host country than AEs, even though the latter group typically have a longer organizational tenure than SIEs. This is interconnected with the motivation to adjust to the local environment: is often higher for SIEs than AEs, since the latter group is very much on their own in the host location and will stay there a longer time. Hence, they are more likely to learn the language (AEs will question why they should learn a language that will be of little use to them in the rest of their career). SIEs are also more willing to emulate typical host country behaviors for problem solving, to form close relationships with locals, to interact with local populations, to better understand the local regulations and culture, and generally to adjust better. There are also distinct differences in network characteristics. AEs have denser networks within the country, but SIEs tend to have larger networks, mostly with colleagues worldwide and with host country nationals. Hence, AEs needing support typically turn to work colleagues, whilst SIEs typically turn to their friends.

The psychological processes involved at the end of the stay abroad are also likely to differ between AEs and SIEs. AEs have more certainty: They are sent to another country for a limited period of time - they and their organizations accept at least a psychological contract, and sometimes a formalized one, that they will repatriate at (or perhaps more commonly around) an expected end-date for their period abroad. This might be varied by circumstances (a world-wide pandemic, for example), by organizational demands, or where the AE has become committed to the country (or perhaps to one of its citizens) and decides to stay on. The business is responsible for returning the expatriate home. AEs expect some kind of repatriation support from their organization and usually enjoy higher clarity about job arrangements in the home country. By contrast, the decision to leave the country for the SIEs is less certain. SIEs tend to stay longer in the host country and to make and manage the decision to leave themselves. Some will repatriate; some will move on to another country: SIEs are more willing to accept another working period abroad than AEs, often resulting in more international organizational mobility (or mobility in the host country), including mobility to another industry. Like the initiation of the foreign stay, and the processes of adjustment to and well-being during the sojourn abroad, the thought processes, the behaviors and the psychological impacts of the end of the foreign stay will differ significantly between AEs and SIEs. Again, our understanding of these issues is extensive for AEs, but there is still much work to be done on SIEs.

**Table 2: The Expatriation Cycle<sup>2</sup>**

<b>Characteristic</b>	<b>SIEs vs. AEs</b>	<b>Source(s)</b>
<i><b>Pre-Relocation Internationally</b></i>		
Interest in internationalism	<b>SIEs &gt; AEs</b>	Suutari & Brewster, 2000
Poor employment situation	<b>SIEs &gt; AEs</b>	
Employer initiative	<b>AEs &gt; SIEs</b>	
Move from less to more developed countries	<b>SIEs &gt; AEs</b>	Peiperl et al., 2014
Move to less developed countries	<b>AEs &gt; SIEs</b>	
Destination: Host country reputation	<b>SIEs &gt; AEs</b>	Doherty et al., 2011
Destination: Career factors	<b>AEs &gt; SIEs</b>	
Repatriation agreement prior to departure	<b>AEs &gt; SIEs</b>	Suutari & Brewster, 2000
Moving abroad with a definite timeframe	<b>AEs &gt; SIEs</b>	

Relocation support from organization in home country	<b>AEs &gt; SIEs</b>	Cerdin & Selmer, 2014
<i>Abroad</i>		
In-country support from organization in home country	<b>AEs &gt; SIEs</b>	Cerdin & Selmer, 2014
More in public sector and as entrepreneurs	<b>SIEs &gt; AEs</b>	Jokinen et al., 2008;
More in private sector	<b>AEs &gt; SIEs</b>	Dickmann et al. 2018
Lower organizational levels/expert positions	<b>SIEs &gt; AEs</b>	Suutari & Brewster, 2000;
Higher organizational level/managerial positions/level of authority	<b>AEs &gt; SIEs</b>	Froese & Peltokorpi, 2013;
Undertake relatively unskilled, casual roles, often below their capabilities	<b>SIEs &gt; AEs</b>	Jokinen et al., 2008; Andresen, Bieman & Pattie, 2015
Broad roles and challenging, according to their capabilities	<b>AEs &gt; SIEs</b>	Inkson et al., 1997
Employing organizations are international or foreign private companies	<b>SIEs &gt; AEs</b>	Inkson et al., 1997
Work in home country companies in their respective subsidiaries	<b>AEs &gt; SIEs</b>	Suutari & Brewster, 2000;
Organizational size	<b>AEs &gt; SIEs</b>	Froese & Peltokorpi, 2013
Variation in salary	<b>SIEs &gt; AEs</b>	Suutari & Brewster, 2000
Additional competitive compensation packages	<b>AEs &gt; SIEs</b>	Andresen, Biemann & Pattie, 2015
Satisfaction with job	<b>AEs &gt; SIEs</b>	Suutari & Brewster, 2000
Motivation to adjust	<b>SIEs &gt; AEs</b>	Froese & Peltokorpi, 2013
Willingness to emulate typical host country behaviours for problem solving	<b>SIEs &gt; AEs</b>	Fontinha & Brewster, 2020
Forming close relationships with locals	<b>SIEs &gt; AEs</b>	von Borell de Araujo et al., 2014
Interacting with local populations	<b>SIEs &gt; AEs</b>	Mäkelä & Suutari, 2013
Understanding language and culture	<b>SIEs &gt; AEs</b>	Sargent, 2002; Peltokorpi & Froese 2009; Froese & Peltokorpi, 2013; von Borell de Araujo et al., 2014
Adjusting easily	<b>SIEs &gt; AEs</b>	
Time spent in host country/longer assignments	<b>SIEs &gt; AEs</b>	Froese & Peltokorpi, 2013, Mäkelä & Suutari, 2013; Cerdin & Le Pargneux, 2010; Alshahrani & Morley 2015



Organizational tenure	<b>AEs &gt; SIEs</b>	Cerdin & Le Pargneux, 2010
Network size	<b>SIEs &gt; AEs</b>	Agha-Alikhani, 2016
Network density	<b>AEs &gt; SIEs</b>	
Network composition: within company	<b>AEs &gt; SIEs</b>	
Network composition: worldwide	<b>SIEs &gt; AEs</b>	
Network composition: HCNs	<b>SIEs &gt; AEs</b>	
Support sources: friends	<b>SIEs &gt; AEs</b>	
Support sources: colleagues	<b>AEs &gt; SIEs</b>	
<b><i>Pre-Repatriation/Moving Internationally</i></b>		
Impact of on-the-job embeddedness on repatriation intention	<b>SIEs &gt; AEs</b>	Meuer, Tröster, Angstmann, Backes-Gelner & Pull, 2019
Impact of off-the-job embeddedness on repatriation intention	<b>AEs &gt; SIEs</b>	
Decision to Repatriate/Relocate	<b>SIEs &gt; AEs</b>	Biemann & Andresen, 2010
Willingness to accept another working period abroad	<b>SIEs &gt; AEs</b>	Suutari & Brewster, 2000; Andresen, Biemann & Pattie, 2015; Alshahrani and Morley 2015
Organizational mobility (even in the host country)	<b>SIEs &gt; AEs</b>	
Movements between different industries	<b>SIEs &gt; AEs</b>	
Organizational repatriation support	<b>AEs &gt; SIEs</b>	Fontinha & Brewster, 2020; Mayrhofer et al., 2020
Clarity about job arrangements in home country	<b>AEs &gt; SIEs</b>	Mayrhofer et al., 2020

<sup>2</sup>Adapted and extended after Farcas & Gonçalves (2016)

### 3. A (short) history of self-initiated expatriates

Throughout most of the late twentieth and early twenty-first century, attention was focused on the expatriates designated as such by their organizations. These assigned expatriates were ‘sent’ by their employer (though sometimes people were recruited) to fill positions in other countries (Black, 1998; Tung, 1998). There was continuing research on the problems of foreign students and on people who used their gap year or the years immediately after university to travel to other countries for ‘a prolonged period of travel, work and tourism’ (Inkson, Arthur, Pringle & Barry, 1997). Typically, such young people headed abroad planning to take what work they can get so that they are at least able to pay necessities and continue their travel across different countries. This reminded scholars that individuals could get international experience outside multinational enterprises, though many of these young travelers would not fulfill the criteria of SIEs as defined above.

In 2000, things changed significantly. Suutari & Brewster reported a quantitative, individual- rather than employer-led, representative study of Finnish professionals working legally in other countries for a period of at least one year - a typical definition of expatriates, excluding short-term assignments (McNulty & Brewster, 2017) - and identified the fact that around half of them had made their own way to those countries rather than being sent by their employer, and the concept, and academic study of SIEs, as we recognize them today, was born. Since then, the number of studies has increased almost every year and there are now books specifically on the topic (Andresen, Brewster & Suutari, 2021; Vaiman & Haslberger, 2013).

Just as the concentration on assigned expatriates came about as a result of ‘outsourcing’ the definition of expatriates and access to them to multinational enterprises, so much of the growth of work on SIEs came about because such businesses were getting increasingly loath to allow access, and SIEs can be accessed through the internet. The problem that left us with, for much of the research, was that the researchers were unable to say anything about the representativeness of their samples and hence little of the work was published in the higher-ranked journals where it attracts more notice. This may be gradually changing as we are evidencing the SIE phenomenon being subject to ever more sophisticated contemporary research like Andresen et al. (2019) on context, Suutari et al. (2018) comparing long-term career impacts of expatriation among SIEs and AEs, and Shao & Al Ariss (2020) on knowledge transfer. It is, however, fair to say that the study of SIEs has been, to this point ‘theory-lite’. We return to this issue below. We explore next some of the main scholarly contributions in the area.

#### **4. Main scholarly contributions**

Suutari and Brewster (2000), originally identified different kinds of SIEs: Young Opportunists; Job Seekers; Officials; Localized Professionals; International Professionals (or global careerists’: Suutari, Tornikoski et al. 2012) and Dual Career Couples. There have been studies of many of these categories – certainly of job-seekers, including both people who go to another country ‘on spec’ and hope to get a job when they get there (Tharenou & Caulfield, 2010) and of those (such as nurses or academics) who apply for the job in their own country and move once appointed (Richardson & McKenna, 2002).

Some of these (or related) categories have received little attention to date. Thus, young opportunists (younger people driven either by a strong desire to experience other countries or by a lack of jobs at

home), localized professionals (people who started as AEs and decided to stay in the country, rather than return home at the end of their assignment) and officials (people working for international or intergovernmental agencies such as the United Nations or the European Union) have been the subject of very little research. Others, however, have begun to be studied in some detail.

One group is expatriate academics. Many of the most active academic researchers of global mobility were expatriates themselves (Selmer, 2017), and Richardson (2000), with what she called, and proved to be, the beginnings of an untold story, was one of the first in the field. There have been studies of expatriate academics' motivation (Froese, 2012), reasons to expatriate (Selmer & Luring, 2013a), cultural similarity (Selmer & Luring, 2009), host country language ability (Selmer & Luring, 2015), work engagement (Selmer & Luring, 2016), and personality (Halim, Bakar & Mohamad, 2014). The work situation/outcomes of expatriate academics has attracted substantial research interest, particularly concerning job factors (Selmer & Luring, 2011a), personal characteristics (Selmer & Luring, 2013b), marital status (Selmer & Luring, 2011b), unhappiness (Selmer & Luring, 2014b), and global mobility orientation (Luring & Selmer, 2014a).

The global careerists category has also attracted increasing attention (Suutari, 2003; Banai & Harry, 2004; Thomas et al 2005; Suutari & Mäkelä 2007; Näsholm, 2014; Suutari, Tornikoski & Mäkelä, 2012; Andresen & Bieman, 2013; McNulty & Vance, 2017). However, this research tradition is often not very clear on whether the respondents are SIEs or AEs (or mixed group of both types) as the focus has been on professionals having long-term careers involving a variety of international jobs. It is common that expatriates who started as either AEs or SIEs later change their employee/contract type. For example, SIEs may be recruited as AEs after having international experience in a certain context and thus becoming an attractive recruitment target for MNCs.

The existing research on global careerists shows they enjoy working in a global work environment and are highly committed to the international work environment. They value having constant development opportunities and a variety of tasks in a multicultural environment. As an outcome, they have developed a 'global identity' (Suutari & Mäkelä, 2007) or an 'international employee identity' (Kramer et al., 2012) or an 'international boundaryless career' (Andresen & Bieman (2013). Näsholm reports the different career narratives of AEs and SIEs who had global careers: for AEs relationships with other expatriates and home country fellows are more important than among SIEs who were more distanced from these groups and better connected with locals. SIEs'

relationships with their employer were largely transactional and they talked more about how they manage their own careers and interesting and developing work, while AEs talked more about career advancement. Näsholm emphasized the importance of the different types of global careers.

McNulty and Vance (2017) concluded that expatriate careers should overall be understood as dynamic, involving frequent moves between different jobs/assignments types. In future, it would thus be useful to have more evidence on global SIE-careers and also more comparative evidence on the differences with other career types.

Dual career couples (DCCs) are perhaps less common than might be expected, largely because in many countries work permits and other legal problems restrict the possibilities. It is not always possible to find good career possibilities for partner abroad and thus partners may not find any suitable jobs or end up taking jobs below the level that they wanted (Vance & McNulty, 2014). This may lead to dissatisfaction and adjustment problems abroad. Such experiences may lead even to identity crises (Kanstrén, 2019). When career possibilities are often limited abroad for partners, DCCs often avoid accepting very long assignments and extensions to such assignments.

Nevertheless, DCCs do occur, for example where one partner is an assigned expatriate and the other then looks for work in the host country (Harvey, Novicevic & Breland, 2009; Käsälä, Mäkelä & Suutari, 2015; Kierner, 2018), they are increasingly well-researched. A DCC is defined as a couple in which “both partners are employed and psychologically committed to their work” (Harvey, 1997), though the rationale for the second phrase is not clear. Such research has already covered issues such as the willingness to leave for an assignment (Selmer & Leung 2003), careers of partner career (McNulty and Moeller, 2017), partner roles (Mäkelä et al., 2011), career coordination strategies of the couples (Käsälä et al., 2015), psychological process that DCCs go through abroad (Kierner, 2018), dual-career support practices (Riusala & Suutari, 2000; Harvey et al., 2010), and repatriation experiences (Kierner & Suutari, 2018), which are facilitated by both partners being able to again focus fully on building their careers (Kierner & Suutari 2018).

What is significant about all these studies is that they have broken away from researching SIEs as a catch-all category. As we have shown, there are different antecedents, different experiences and different outcomes depending on which category is being explored. Studies that aggregating these categories risks either ignoring some key factors or of ‘averaging out’ some of the distinctions. Of course, the Suutari and Brewster (2000) list is not definitive and the more granularity that can be

brought into our studies the better. There is work being developed that examines other categories too.

## **5. What do we know and what do we need to know**

As our review indicates, research on SIEs has already covered various topics. We already know much about the differences between AEs and SIEs. Starting from individual-level factors, comparative studies between AEs and SIEs have indicated that these groups tend to have different motives and decision-making criteria when deciding to move abroad. On average, they also tend to work in different roles and, in particular, there is much more variation among SIEs in the types of jobs and employers they have abroad than among AEs. SIEs are more likely to learn the local language and tend to get better integrated locally, while AEs rely more on their corporate network. Their overall international experience also differs, since SIEs generally stay longer abroad. Since SIEs have less overall support during their expatriation process than AEs, they need to take a lead on managing their own careers. As an outcome of such differences, SIEs are more active in their career mobility across different organizations and industries.

Identifying the differences between SIEs and AEs, however, risks overlooking the range of subdivisions of the SIE category, which, as noted, is considerably wider than the range of categories amongst AEs. Some of these categories (academics, medical professionals) have been subject to research studies but some have so far not been the focus of research or been subject to only limited research. It is not of course possible to specify how many such groups there may be since that would depend on levels of analysis and the purposes of the categorization. However many there are, we need more understanding of these under-studied groups.

For example, one such group, not large but visible, is sports professionals, especially those who specialize in team sports (Ruta & Sala, 2018). Although there is plenty of academic research on sport (Downward & Dawson, 2000; Söderman & Dolles, 2013), studying sports professionals as expatriates has just begun in earnest. Dolles and Egilsson (2017) provide a useful overview of sports professionals as SIEs, while van Bakel and Salzbrenner (2019) continue the foundation-building by examining motivations to move abroad as well as adjustment challenges and the lack of support. Egilsson and Dolles (2017) explore the experiences of young players joining professional European football leagues.

Other under-researched SIE communities include international schoolteachers, healthcare professionals and low status expatriates (LSEs). Among the first mentioned group, there are just a handful of academic journal articles. For example, Baily (2015) examined practical, cultural and professional challenges expatriate teachers experience as they transitioned to an international school setting, while Bunnel (2016, 2017) and Poole (2019) characterize these SIEs as a neglected community of a ‘precariat’ suffering from a lack of agency, financial insecurity, and the marginalization of professional identities. Baily (2021) investigated their precarity during the Covid-19 pandemic.

Research findings on expatriate healthcare professionals are often reported in medical journals or other non-HRM outlets, due to the character of the population. Some of these expatriates are not SIEs, as they are assigned by international humanitarian or global healthcare organizations, such as Oxfam International and *Médecins Sans Frontières* (Alfes, 2018; Brewster, Boselie and Purpura, 2018). Others however apply from the outside for jobs with those organizations; and others work for a wide range of organizations that they have joined once in the country and, in both cases, are therefore SIEs (Bozionelos, 2019). There are interesting new topics here, not covered in much of the SIE literature (Toomey & Brewster, 2008). For example, (Hunt, 2009a, b) reports ethical problems and the moral experience among expatriate healthcare professionals; others have studied the mental health of expatriate nurses in Saudi Arabia (Zaghloul et al., 2019; Saquib et al., 2020).

The largest group of SIEs is almost certainly the low status expatriates, people, almost always from poorer countries, working in richer countries as construction workers, security officers, beauticians, caregivers, nannies and maids: Nearly all of them are separated from their family and forbidden by law from becoming citizens of the countries they work in and are liable to deportation at almost any time (International Labor Organization, 2015). They earn comparatively little money and yet out of this they manage to send home trillions of dollars every year to support their children and other family members back in their home countries (World Bank Group, 2016). Despite this being such a large group, scholars have only recently begun to investigate them (Haak-Saheem & Brewster, 2017; Haak-Saheem, Brewster & Luring, 2019). Unusually for SIE studies, but perhaps not for SIEs in the real world, studying low status expatriates has raised the role of ‘intermediaries’ (Agunias, 2009), third-party agents who facilitate or exploit the process.

## **6. Future research and modes of study**

The field remains wide open. There is still considerable potential and scope within academic research on SIEs. Many very important categories of these expatriates are under-researched and others are virtually ‘white areas’ on our maps.

Although this huge amount of undiscovered territory can be charted by conventional methods of data collection, such as personal interviews and survey questionnaires and analyzed with qualitative or/and quantitative techniques, new types of inquiry will also be useful. For example, big data analytic techniques can be applied (Hewson & Laurent, 2008; Platanou et al., 2018). Collecting online data from the internet through sources that were not originally intended for scholarly research, such as websites, online news, social media platforms, blogs and discussion forums (Venturini et al., 2014), can bring unexpected advantages. Such data collection techniques may produce what many researchers want but seldom get, a relatively easy way to acquire a longitudinal data set (Granello & Wheaton, 2004). There are research opportunities at the other end of the spectrum, the more individualized and personal end, too: Rarely used technologies such as diary studies, narratives and textual analysis, and even ethnography, may yield new insights through more detailed and finer granulated data that is so far mostly missing from studies of SIEs.

These future opportunities will be explored by mapping a future research agenda offering five Research Directions for scholarly research on SIEs.

*A: Continuing conceptual concerns*

The very core characteristic of SIEs is that they expatriate to work abroad on their own initiative. However, applying a contextual point of view, it could be unrealistic to attribute an equally high extent of personal initiative to all SIEs due to, for example, differing mitigating circumstances when entering a host country (Andresen, Pattie & Hippler, 2020). Consequently, there are good reasons to further develop the core characteristics of SIEs. The core of the notion (the stereotype to use the lexicographical term) may be relatively clear, but at the periphery there may be reasons for concern. It seems fairly clear, for example, that most low-status expatriates are SIEs but there may be some who fit better into the category of migrants (in countries where they are allowed to become citizens), and some who may be sent as assigned expatriates - see the continuing stories in the press – though there is little scholarly evidence: [Zheng, 2013] - of Chinese firms exporting complete workforces to Africa for example. The same concerns may apply to expatriates who become entrepreneurs in their host country (Selmer, McNulty, Lauring, & Vance, 2018). Some of these may also settle down there and become migrants. More research is needed here.

Other concerns relating to the blurriness of these categories may be encapsulated as a concern with fungibility. We know that whatever categorization of international mobility we adopt, there will be many people for whom their status changes: They may enter a country as a SIE but then stay on there, and, perhaps because they become very fond of the country – or perhaps of someone in it - they become an immigrant. Or they may enter the country as an AE and for similar reasons prefer to stay on there at the end of their assignment rather than return home: In such a case they may either come to an arrangement with their current employer to move to a local contract or move to another employer, in either case becoming an SIE. Or they may decide to settle permanently in the country, becoming an immigrant. Whilst we are all aware of these transitions and they are flagged up in every attempt to clarify concepts of international mobility, we know very little about these transitions (Ramboarison-Lalao, Brewster & Boyer, 2019). There is a useful set of theories about liminality and transition that could be drawn on here (Söderlund & Borg, 2018.). We need:

*Research Direction 1:* More clarity around the concept of SIEs and self-initiated expatriation.

*Research Direction 2:* Greater understanding of the transitioning between SIE and other categories

*B: The diversity problem within the concept of a SIE and how to deal with it*

Characteristic of all SIEs is that they have expatriated to work abroad by their own initiative. In practice, that creates an enormous diversity and unfortunately some researchers do not, or perhaps are unable, to specify which groups or sub-categories of SIE they have been researching. Sadly, given the dangers of averaging out and the limitations that places on comparison with other research into SIEs, such research is more or less useless. Unless we know who is being studied, we cannot learn much about the subject matter under review. We need, therefore, more clarity about which groups of SIEs are being researched.

And that in turn leads on to a need for more research on various sub-categories of SIEs. In none of the sub-categories we have mentioned so far can we be confident that there is nothing more to learn. More importantly there are many sub-groups that have been largely unresearched. There is the small but important group that Suutari and Brewster (2000) referred to as ‘officials’: We know very little about them as expatriates. There is the much larger but still significantly under-researched group of low-status expatriates. Our lack of information and of knowledge about this group is a serious challenge to our credibility.



There are other sub-groups that we have not mentioned yet: SIEs in the culture sector (musicians, actors and performers), SIEs in the aid and emergency support sectors, SIEs in the religious sector, SIEs in the security and defense industries, and a great many more.

There may be sub-categories that are not related to occupations. For example, we are getting limited evidence that expatriation from a workers' co-operative in the Basque country is unusual in terms of Europe (Bonache & Zárraga-Oberty, 2018). Perhaps the same thing applies to SIEs who leave the Basque country. Are we safe in assuming that the motivations and processes of expatriation that have been discovered for Western SIEs would be the same for self-initiated expatriates from the Asia-Pacific region? How different are married SIEs, or SIEs with families? What do we know about SIEs from Latin America or Africa?

*Research Direction 3:* We need more work on sub-categories of SIEs.

#### *C: Global talent management of SIEs*

As noted throughout this chapter, there is plenty of research into the motivations and circumstances of SIEs (Richardson & McKenna, 2002; Selmer & Luring, 2010, 2012), but although the subject has been flagged up (Vaiman & Haslberger, 2013; Vaiman, Haslberger & Vance, 2015), there is much less information about the way SIEs fit into organizational strategies and how they are managed. The traditional focus on assigned expatriates and the carrying out of research into AEs by working with organizations, mean that the implications of even individual findings were filtered through company policies and practices in that area even if they did offer insights into the feelings of the expatriates. As a mirror image, the focus on the self-initiated expatriates themselves and the collection of data from individuals through web-sites etc., has told us a lot about their issues but very little about company policies and practices. We know that they are sometimes used by multinational corporations as boundary-spanners (Furusawa & Brewster, 2018) but otherwise we know little about why local businesses recruit SIEs or what they expect from them or how they exploit their international contacts and networks. How does the management side of SIE employment work? How does SIE employment fit with the mix of different kinds of people that the organization employs? Do businesses strategically manage SIE and, if so, how?

*Research Direction 4:* We need more research how employers use SIEs.

#### *D: Modes of inquiry of under-researched groups of SIEs*

Learning more might be inevitably inter-related to the adoption of new forms of research technology. For example, where ample documentation is available on the internet (e.g. regarding CEOs for large MNCs or famous coaches in team sports), big data analytics can be applied to create comparative advantages, by, for example, generating longitudinal data sets more easily than by conventional means (Granello & Wheaton, 2004). Further, since data collection is a bottleneck in many empirical studies of SIEs, internet sources have been used in many ways (Doherty, Dickmann & Mills, 2011; Isakovic & Whitman, 2013; Selmer & Luring; 2012). Unfortunately, we still know too little about how to safeguard the rigor of such research and more work on this may pay useful dividends. Other research methods may also be particularly valuable: For example, ethnographic studies of self-initiated expatriates *in situ* might bring rewarding insights. There have been examples of narrative research, examining the life-stories of SIEs (Scurry, Rodriguez and Bailouni, 2013). There are developing options for more radical research technologies. For low-status SIEs and SIEs in the aid sector or the security industry, photographs and news footage give us an indication that newer research methods exploring the visual technologies might be able to give us a deeper understanding than we have had hitherto. These kinds of ‘rich’ research projects can give us not just an understanding but a feel for the circumstances of their subjects.

*Research Direction 5:* There is a need to develop our armory of research technologies to include rigorous methods that offer new data.

## **7. Conclusions: Research on self-initiated expatriates in a new world**

Although no-one would argue that there is nothing more to be found out about assigned expatriates, they remain the focus of most research in this field in industrial and organizational psychology. Assigned expatriates are almost invariably organizational elites (it does not make organizational sense to invest the costs involved in lower-graded members of staff) and are usually well supported. Neither of these factors applies to self-initiated expatriates: They exist at all organizational levels and usually have very little or no organizational support. They are in a different situation and we cannot therefore extrapolate the learning from AEs to SIEs. We need a wider and deeper research effort to understand the specific circumstances of self-initiated expatriates.

The phenomenon of SIEs has developed from being virtually unknown in the literature to becoming the center of a substantial research domain in little more than two decades. Although still

advancing, research on SIEs can no longer be justified with the once popular claim that SIEs are under-researched (Peltokorpi & Froese, 2009; Suutari & Brewster, 2000; Vance, 2005). A key task now is to develop the theoretical base of SIE studies. There is unlikely to be a ‘theory of SIEs’: Rather, what is likely to develop is the application of theories from other areas in specific aspects of SIE research. Thus, to take a couple of examples, research into SIE motivations and career development could utilize career research theories (Mayrhofer, Smale, Briscoe, Dickmann & Parry, 2020) and research into SIE adjustment to the host country could use adjustment (Haslberger, Brewster & Hippler, 2014), acculturation (Berry, Kim & Boski, 1988) or anxiety/uncertainty management theory (Gudykunst, 2005). Theories of cultural identity (Jensen, Arnett & McKenzie, 2011) have been applied to migrants (Vershina, Korkiya, Mamedov & Panich, 2015), but it is generally assumed that since expatriates are in the host country for only a limited time, they will adopt a ‘temporary’ identity whilst there (see Mao & Shen, 2015; Peltokorpi & Zhang, 2020). SIEs, as we have seen, are more likely to stay in the country longer and so fall somewhere between assigned expatriates and migrants in that sense and there may be interesting results from applying cultural identity theories to self-initiated expatriates.

As demonstrated by this chapter, extant research on SIEs is as substantial as it is varied. But, as with much academic research, SIE-relevant investigations must keep up with the changing times. Associated with the devastating global consequences of the Covid-19 pandemic, a torrent of related scientific studies in practically every scholarly discipline, including ours, has been initiated. The pandemic may not only change current circumstances for SIEs, but also alter conditions and demand for them in the future. For example, one may speculate that some international work may continue to be done virtually, even after the pandemic (Selmer, 2021), while some groups of SIEs will be favored rather than others. Hence, shifts in future demands of SIEs, their characteristics and contexts may take place, justifying a refocusing of new scholarly research on SIEs. Beside pandemic-related research, our five research directions represent an agenda for the further development of research on SIEs. We need to know who they are and when they become SIEs and when they stop being one. Similarly, we need to know more about the different types of SIEs and their specific characteristics and contexts. From an employers’ point of view, we know very little about why SIEs are hired and how they are used. We need more scholarly research on SIEs and the need for more knowledge justifies developing and applying better research methods that can generate new data.

Even for scholars as familiar with academic research on SIEs, like the three authors of this chapter, it has been a revelation to discover how far the area has come in a short time and how varied the contributions have become. We anticipate that this positive development will continue in the future and hope that this book chapter will facilitate such an outcome.

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