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Guest Editors' Introduction

Advancing the Field of Global Mobility: Complexity and Challenges

Expatriation is undoubtedly a critical organizational practice (Harvey and Moeller 2009; Scullion, Collings, and Caligiuri 2010). Yet the speed with which the internationalization of business and of life in general is growing and changing has challenged the conventional wisdom concerning the “traditional” international assignment (see Andresen, Biemann, and Pattie 2012; Kuhlmann and Hutchings 2010). The familiar “there-and-back” models of the past have been supplanted by a diversity of new and complex patterns of global mobility (e.g., Arp 2014; Teagarden 2010), creating diverse challenges and opportunities for individuals and employers. While global mobility research has come a long way in the past couple of decades, its study still lags behind practice often because academics are focusing on aspects of mobility that are very different from those given priority by practitioners.

We suggest that global mobility scholarship needs to be re-energized to demonstrate thought leadership and deliver research that has intellectual integrity and practical impact. Traditional expatriation, in short, is at risk of becoming “not just unproductive, but counterproductive” (McNulty and Inkson 2013, i). We must do better in our theorizing and research approaches to create innovative “bridges” that encourage knowledge sharing across communities of learning and practice.

This issue is devoted to exploring new directions in global mobility research and practice. Our goal is to advance the field by moving beyond the very limited terrain of traditional patterns of expatriation and traditional assignees in large

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corporate global firms (e.g., Brown 2008; Dickmann and Doherty 2010; Stahl, Chua, Caligiuri, Cerdin, and Taniguchi 2009; Wittig-Berman and Beutell 2009), to instead consider the context within which, and from which, modern expatriation is emerging and rapidly changing. Such “context” includes relatively under-researched areas of expatriation we know little about: minority expatriates (Gedro 2010; McNulty 2014; Pattie and Parks 2011), noncorporate expatriate settings (Davoine, Ravasi, Salamin, and Cudré-Mauroux 2013; Fee and Gray 2011), and expatriation in emerging markets (Leung, Wang, and Hon 2011; Stalker and Mavin 2011; Tung and Haq 2012).

In the articles that follow, we highlight the value of different disciplinary and theoretical perspectives and research methodologies to inform understanding of global mobility practice. We also emphasize the value of alternatives to traditional expatriation so as to assist companies to expand their talent pool options, fulfill their global staffing needs, and replace the costly assignments of the past with more cost-effective solutions in a somewhat tight job market. We bring attention to the perspectives of multiple stakeholders: individuals and families from diverse backgrounds; and organizations in different sectors and geopolitical contexts. We achieve this through careful selection of three types of papers in the issue—empirical studies, conceptual papers, and reviews—each engaging in critical reflection of the meanings, definitions and context pertaining to key constructs and emerging phenomena in global mobility. Our hope is that readers will gain new ideas and perspectives to advance not just their own scholarly or practitioner agenda, but also that of the communities in which they live and work.

Overview of the contributions

The call for papers attracted a total of 28 submissions from authors in 16 countries. Following review, nine papers were selected for a double issue, over two volumes. We have drawn on an extensive network of expert scholarly reviewers for each manuscript and are extremely grateful to all of them for their excellent work. The four articles we have chosen for this volume, which includes a number of high quality articles from doctoral and early career researchers, focuses on fresh insights and perspectives that are provocative in exploring other “voices” and new directions and emerging patterns of international assignments, expatriation, and global mobility. Each is well-grounded in theory, rigorous in research method, and has strong practical applicability.

The first article, by Mila Lazarova in Canada, Jean-Luc Cerdin in France, and Yuan Liao in Australia, provides empirical validity and reliability evidence for an internationalism career anchor that appears to be strongly related to willingness for international mobility and knowledge—skills and abilities that are associated with successful global careers. Based on the work of Schein’s (1990) original career-anchors framework and Suutari and Taka’s (2004) extension, their analyses, using

two samples in France, present evidence suggesting that internationalism is a distinct career anchor being positively associated with competencies usually held by people who want to pursue international careers. By extending an established framework from careers research, their study aims to bring more theoretical legitimacy to research in this area. Their research makes a strong contribution to both research and practice, by applying rigorous methods to build evidence for construct validity and reliability and to develop a simple, practical assessment tool.

The second article, by Charles Vance in the United States, and Yvonne McNulty in Singapore, builds on the Vance (2005) pre-expatriation international career development model to examine the experiences arising from women undertaking self-initiated expatriation (SIE). Utilizing a mixed sample of female and male American expatriates in Western and Central Europe, the study finds that women select and utilize the SIE track to acquire international competencies and career development more so than men. While the study addresses three limitations of the original Vance (2005) model, findings also show that women experience fewer encounters with gender bias in the international business environment than prior research suggests, rely heavily on entrepreneurship and on-site networking to further their self-initiated expatriate experience, and often gain important sources of support from close personal relationships with locals in the host location. The study contributes to the small yet growing body of literature focused on women as self-initiating expatriates.

The next article, by Phyllis Tharenou and Pi-Shen Seet in Australia, examines why mainland Chinese students who study abroad repatriate to China, how they fare on reentry to China, and whether they re-expatriate. Their review of 29 empirical studies shows that when deciding on their mobility at all stages (repatriation, re-entry, re-expatriation), Chinese students are affected not only by career and economic opportunities, but also by social and psychological factors, including family, lifestyle, and cultural identity, which are central to any integrative explanation of why Chinese students who studied abroad repatriate to and remain in China. The authors' new perspective in conceptualizing a dynamic process for the reverse brain-drain of Chinese students comprising repatriation, reactions to reentry, and possible re-expatriation is a theoretical advance from earlier studies that have focused only on repatriation.

The final article, by Kathrin J. Hanek and Fiona Lee in the United States and Mary Yoko Brannen in Canada, examines how individuals who have been exposed to multiple cultures differ in their cultural experiences, cultural identities, and adaptation to foreign cultures. Using a sample of multicultural business students, the authors found that individuals ("globals") who have had exposure to multiple foreign cultures starting at an early age were less likely to identify with cultural groups and less culturally adaptive, suggesting there is no single type of "multiculturalism," and that having more and earlier multicultural experiences does not necessarily predict better adaptation outcomes. Furthermore, while "globals"

constitute a distinct group of multiculturals, they are more likely to have a marginal cultural identity, challenging the idea that extensive and early cultural exposure is unequivocally beneficial.

Complexity and challenge

While the articles in this issue offer varied and important contributions central to understanding global mobility research and practice, gaps in knowledge remain in both academic and practical terms. We suggest some additional ideas for future research.

First, we argue that for scholarship in global mobility, and international human resource management (IHRM) more broadly, to advance, we need to pay careful attention to and generate clarification of key constructs, their measurement, and their application. Suddaby's (2010) criticisms of the management field also apply to IHRM: weakly communicated or too-narrowly defined constructs may lead to situations where the results of academic research are not perceived by the practitioner community as having practical value.

Second, the context of our global mobility research matters. The dominant focus on large multinational corporations (MNCs), and particularly on MNCs headquartered in developed economies, has for a long time overshadowed the very necessary research on (and reality of) global mobility for individuals outside the corporate world, in different organizational forms and geopolitical contexts, and beyond organizational boundaries. The global shift in power toward emerging markets in international business and economic growth in new territories (see Sheehan and Sparrow 2012) presents complex and uncertain challenges for global mobility research and practice that must be addressed.

Third, we must do better in our research design and choice of methodology. As one example, an important development across management research that has interesting potential for global mobility scholars is the effectiveness of multilevel theorizing and modeling. Indeed, IHRM researchers have for some time called for the use of multilevel logic in scholarly theorizing (Wright and van de Voorde 2007), reflecting the increasing interest in multilevel modeling in management studies (Mathieu and Chen 2011; Molloy, Ployhart, and Wright 2011), international business (Peterson, Arregle, and Martin 2012) and HRM (Wright and Nishii 2007).

Fourth, a key matter for the attention of practitioners as well as academics is that, in today's turbulent global context, the field of global mobility has a responsibility to develop and implement strategies, policies, and practices that address social concerns, and to broaden notions of "success" and "performance" beyond financial performance (Wang and Choi 2010).

Overall, in this issue we have outlined a number of important areas to be addressed and offered examples of research that have the potential to capture and analyze some of the evolving challenges in global mobility we have identified. Still, gaps remain. In the second volume of this special issue, we further advance scholarship on global mobility with five papers that raise additional ideas and insights.

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YVONNE MCNULTY AND HELEN DE CIERI

Guest Editors' Introduction

Advancing the Field of Global Mobility: Reflection, Refraction, and Redirection

There is an extensive body of literature on how global mobility and international assignments are managed (Bonache, Sanchez, and Zarraga-Oberty 2009; Carraher, Sullivan, and Crocitto 2008; Harvey, Novicevic, and Breland 2009; Haslberger and Brewster 2008; Inkson and Thorn 2010; Scullion, Collings, and Caligiuri 2010). The bulk of this literature, however, focuses on traditional expatriates undertaking long-term international assignments in large corporate global firms (Colakoglu and Caligiuri 2008; Hippler 2009; Osman-Gani and Rockstuhl 2009; Shen and Lang 2009). Much less has been written about nontraditional assignments and the nontraditional assignees who go on their own (Meyskens, von Glinow, Werther, and Clarke 2009; Thite, Srinivasan, Harvey, and Valk 2009). Even less has been written about new trends in global mobility, particularly across emerging markets and noncorporate settings (Merlot, Fenwick, and De Cieri 2006; Oberholster, Clarke, Bendixen, and Dastoor 2013). Hence, what has been published to date focuses on a very limited number of contexts. We suggest that much can be learned from exploring new directions in global mobility to move beyond the terrain of only traditional patterns of expatriation.

In this second part of a two-part issue on “Advancing the Field of Global Mobility,” we present five articles that are provocative in exploring new directions and emerging patterns of international assignments, expatriation, and global mobility.

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Overview of the contributions

The call for papers attracted a total of 28 submissions from authors in 16 countries. Nine papers were selected for a two-part issue. The five articles we have chosen for this second part, which includes a number of high-quality articles from doctoral and early-career researchers, focus on fresh insights and perspectives that are provocative in exploring other “voices” and new directions and emerging patterns of international assignments, expatriation, and global mobility. While the articles we present question not only the role and effectiveness of narrow definitions of global mobility, each also offers a distinct perspective on managing the global mobility function, including a future research agenda for scholars, as well as practical implications for organizations to consider.

The first article, by Thomas Hippler in the United Kingdom and Paula Caliguiri and Johanna Johnson in the United States, explores the current conceptualization and operationalization of the construct of “expatriate adjustment” that the authors’ contend is preventing our field from advancing further. With a focus on three central concerns, their review article systematically critiques the lack of theoretical and methodological rigor surrounding the development of the expatriate adjustment construct, namely that research on expatriate adjustment still appears to be fragmented and not very cumulative, and is inconsistent. The authors identify some of the theoretical issues that might prevent expatriate adjustment research from developing a more cohesive and consistent body of knowledge and make suggestions as to how these issues might be overcome.

The second article, by Jan Selmer and Jakob Luring in Denmark, investigates whether self-initiated expatriates (SIEs) are particularly vulnerable when starting up a new life in another country due to having no support from a home organization. From the perspective that not all individuals are equally suited to expatriation, the authors’ extend the inconclusive findings from the “Big Five” personality traits to explore other personality traits that may be more precise in predicting expatriate adjustment for SIEs. With a focus on the dispositional affectivity (DA) on adjustment of 329 SIEs in Denmark, results showed consistent beneficial associations between positive affectivity and all the studied adjustment variables, and detrimental associations between negative affectivity and the adjustment variables. Thus, the strong relation between DA and expatriate adjustment suggests that this personality trait is a more precise determinant for expatriate adjustment than are previously studied traits.

The next article, by Maury Peiperl, Orly Levy, and Michael Sorell in Switzerland, utilizes a large-scale study that tracks self-initiated and organizational expatriates together, both over time and across geographies. By analyzing patterns of geographic mobility and then examining the rate, duration, and direction of self-initiated and organizational expatriation over 16 years, this study supports earlier research suggesting that career self-determination is preferred over long-term organizational careers. Given that such comparative studies are noticeably

absent from the literature, the authors' analysis of the mobility patterns of 55,915 highly skilled individuals who made 76,660 cross-border moves between 1990 and 2006 is a unique contribution, highlighting the distinct differences between these corporate-initiated and self-initiated groups of expatriates.

The research note, by Nina Cole and Kimberly Nesbeth in Canada, examines the causes of failed international assignments from the perspective of expatriates, a heretofore "hidden voice" on this important topic. Drawing on a qualitative study of 64 expatriate families who self-identified as having prematurely returned from an international assignment, the findings confirm prior research showing that family concerns is one cause of assignment failure, but that other reasons exist, primarily insufficient organizational support.

The final research note, by Elise Tait and Helen De Cieri in Australia and Yvonne McNulty in Singapore, explores the rapidly growing phenomenon of "permanent transferees." This small study in a Singapore-based subsidiary of a global knowledge-based firm examines the motivation, adjustment, retention, and careers of expatriates who subsequently localize permanently in the host location, comparing them to traditional expatriates in the same location. Expatriates who are expected to work as "locals" in a host country not only receive less compensation, but also receive less preparation and support than traditional expatriates despite the fact that both work under similar conditions and face similar challenges. The study has important implications for research and practice in the planning and management of global mobility programs, not in the least because permanent transfers and localization are widely, and increasingly, used in multinational corporations (MNCs), yet largely overlooked and even misunderstood by academics.

Reflection, refraction, and redirection

The nine articles in this two-part issue collectively point to the need for scholars in our field to acknowledge the limitations of widely held assumptions about expatriation and global mobility, and, for example, the efficacy of constructs, such as "expatriate adjustment," that, while having driven much of the research over the past 30 years, now require updating (see Hippler, Caliguiri, and Johnson in this issue). It is also important to question, and if necessary validate, relatively new yet crucial constructs such as the "internationalism career anchor" (Lazarova, Cerdin, and Liao in Part I) and "multiculturalism" (Hanek, Lee, and Brannen in Part I) that not only advance our knowledge but also ask whether existing research is likely to lead to its intended constructive outcomes.

At the same time it is crucial to promote "engaged scholarship" (Björkman, Barner-Rasmussen, and Vaara 2010, 420) that acknowledges the various stakeholders and interests in and around global mobility, beyond that of the corporate MNC and its traditional assignees (see Vance and McNulty in Part I; and Peiperl, Orly, and Sorell in this issue). One way this can be achieved is to examine the social, emotional, and "human" aspects of expatriation (e.g., Selmer and Luring in this

issue) that might otherwise remain unexplored. Another way is to delve into critical yet under-researched areas, including emerging market expatriation and the growing use of other types of expatriates, such as permanent transferees, as alternatives to costly long-term assignees (Tait, De Cieri, and McNulty in this issue).

Such scholarship, however, does not imply a lack of relevance for practitioners. In fact, a greater understanding of contemporary problems and challenges, for example of China's reverse brain drain (Tharenou and Seet in Part I), and the causes of international assignment failure (Cole and Nesbeth in this issue), helps to better manage expatriates and the vast array of organizations that employ them.

It is our hope that the articles in this issue represent a valuable step forward in studies of international assignments by raising interesting insights, testing long-held assumptions, and offering new understandings to advance scholarly research on modern expatriation. While some gaps remain, largely reflecting the complexity of global mobility, we continue to encourage further research in areas that have been neglected to date. Dynamic environments and unsettling events of the past decade, such as the global financial crisis, have been a catalyst for reflection, analysis, and identification of new challenges for human resource management (HRM) (e.g., Zagelmeyer and Gollan 2012) and international HRM (IHRM) scholarship (e.g., Sheehan and Sparrow 2012). It is worthwhile to take stock, to reflect on what we have learned, and to explore how we may advance the scholarship and practice of global mobility.

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