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## **Self-initiated expatriation and self-initiated expatriates:**

### **Clarification of the research stream**

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#### **Abstract**

**Purpose:** This paper moves towards clarification of the self-initiated expatriate/expatriation construct with the aim of extending and deepening theory development in the field.

**Design/Methodology/Approach:** Drawing on Suddaby's (2010) think piece on construct clarity, this paper applies his proposed four elements; definitional clarity, scope conditions, relationships between constructs and coherence, in order to clarify the SIE construct.

**Findings:** The discussion examines the 'problem of definition' and its impact on SIE scholarship. The spatial, temporal and value-laden constraints which must be considered by SIE scholars are expounded, and the links between SIE research and career theory are developed. From this, potential research agendas are proposed.

**Originality/Value:** Although the definitional difficulties of SIEs have been identified in previous literature, this is the first attempt to clarify the boundaries of SIE and its interconnectedness with other related constructs.

**Key words:** Self-initiated expatriation, self-initiated expatriates, construct clarity.

**Paper type:** Conceptual

## **Introduction**

The papers in this special issue discuss some of the key aspects of self-initiated expatriation (SIE) highlighting both the complexity of the concept itself and the diversity in how it has been used and understood. The variety of theoretical and empirical approaches applied in the study of SIE to date reflects a broad and necessarily subjective interpretation of what SIE encompasses. Therefore, rather than forcing an ‘absolute’ definition for SIE, we think it is incumbent on us, as guest editors of this special issue, to embrace and engage with this diversity whilst at the same time setting a path towards construct clarity .

Suddaby (2010), in a recent issue of the *Academy of Management Review*, highlighted the importance of construct clarity in management scholarship. He asserts that the essence of construct clarity comprises four basic elements – 1. providing clear definitions, 2. scoping the field, 3. demonstrating relationships with other associated constructs and 4. providing coherent and logical consistency (p. 347). The specific value of achieving construct clarity, he indicates, is that it benefits communication between scholars; helps facilitate the exploration of phenomena empirically and allows for greater innovation in applied research. These are challenges we suggest that the construct of SIE currently faces. We begin our paper, therefore, with an examination of how the SIE construct might be clarified.

## **Clarity in Definition**

Suddaby suggests that a robust definition captures the essential characteristics of the respective concept. Therefore, in order to understand the essential characteristics of SIE, we must first consider how the term has evolved and how it is being used. The origin of the concept is widely acknowledged (see, for example Dickmann and Doherty, 2010, Froese, 2012, Suutari and Brewster, 2000) as stemming from Inkson, Arthur, Pringle and Barry’s

(1997) exposition of the differences between the well-studied corporate expatriates, who have been sent on an overseas assignment by their employer, and young New Zealanders who have independently chosen to leave New Zealand temporarily as part of what is widely recognized as an 'Overseas Experience'. Suutari and Brewster (2000) further explored and extended the characteristics of individuals who chose to live and work outside their country of origin without the support of an organization in their research on Finnish residents. In the European context, the term 'overseas' was not appropriate, so they coined the concept of 'self-initiated foreign experiences' (SIFE). This terminology was also adopted by Myers and Pringle (2005) in their study of gendered influences on educated professional "free travellers", defined as individuals who "were not going to pre-arranged jobs" but who all "engaged in work during their international overseas experience" (p, 425).

The term SIFE, however, failed to gain currency in the academic field, perhaps because it was lacking linguistic coherency. Moreover, SIFE focuses attention on the experience rather than the individuals undertaking the experience. The linguistic difficulty of continually referring to 'a person who undertakes a SIFE' may have limited the use of this phrase.

Richardson and her colleagues were simultaneously developing terminology to describe those who chose to relocate across international borders. The use of the terms 'self-selecting expatriates' (Richardson and McKenna, 2002, p. 67) and 'self-directed expatriates/expatriation' (Richardson and Mallon, 2005, p. 409) simplified the written usage of the terminology, and re-established the common feature – expatriates and expatriation, or people living/working in countries other than their home country. McKenna and Richardson (2007, p. 307) subsequently examined professionals who expatriate without organizational sponsorship, calling these 'Independent Internationally Mobile Professionals' or IIMP.

In 2008, the term ‘self-initiated expatriates/expatriation’ first appeared in the literature, with articles by Doherty and Dickmann (2008) and Jokinen, Brewster and Suutari (2008). The following year, a symposium at the Academy of Management entitled ‘Self-initiated Foreign Experiences’ reverted to earlier terminology, but extended an invitation to start discussions on the possibility of moving towards a single construct (Inkson and Richardson, 2010). An informal caucus held at the same conference, and attended by 60% of those authors who had published in the field at that time, agreed on the term SIE, and this has remained fairly constant in the literature since then. The rationale for using this particular construct was three-fold. First, ‘self-initiated’ would distinguish those who were ‘sent’ by an employer from those who independently elected to relocate across international borders. Second, ‘expatriate’ would distinguish between those who were leaving their home country on a temporary basis and those who were leaving on a permanent basis, i.e. immigrants - a related but qualitatively different group. Third, the term ‘foreign’ was viewed as redundant as it effectively duplicated the meaning of expatriate.

Exploring the ‘problem of definition’ in the literature over the intervening years since the caucus suggests that the term SIE infers two essential components. The first is that SIE must involve relocation across a national border. Hence, SIE must be about physical mobility (Sullivan and Arthur, 2006) where the individual moves from one country to another (Inkson, 2006). Second, the initiative for that mobility must come from the individual, with individual volition being central to the concept of SIE.

However, despite the move towards more definitional clarity, further exploration and critique is required. Whereas expatriation is certainly about independently leaving one’s home country, as the global landscape is becoming more complex, the range of variations in the

categories of globally mobile individuals expands. We sense a shift in the underlying parameters of the concept that is indicative of a struggle to clarify both the definition and usage of the term. It perhaps also reflects the dynamic contemporary nature of global mobility and the evolving terminology which attempts to describe it. Recent additions to the lexicon include self-initiated repatriation (Begley et al., 2008, Tharenou and Caulfield, 2010) and, in the context of multiple moves by an individual, self-initiated mobility (Thorn, 2009a).

Expatriates were initially differentiated into two distinct populations; those sent or sponsored by companies and those solely taking the initiative themselves outside the corporate context. These boundaries, however, are being blurred with increasing recognition of other sub-groups or nested groupings in the field. For example, one distinct but related group is that captured by the concept of the ‘global self-initiated corporate expatriate’ (Altman and Baruch, 2012) who is understood as someone who self-initiates expatriation but within a single employer. These are people who would seek out a foreign posting within their organization, perhaps to a foreign subsidiary, rather than waiting to be sent by their employer.

Furthermore, in seeking to distinguish ‘expatriates’ from ‘immigrants’, we must engage with the ‘problem’ of permanence. That is to say, where expatriates (both self-initiated and those who are sent by an employer) are assumed to be leaving their home country on a *temporary* basis, whereas immigrants are assumed to be leaving on a *permanent* basis (see, for example, Al Ariss and Özbilgin, 2010). The extent to which we can assume a move to be temporary may change over time depending on individual circumstances. The temporariness of a move may even be outside the consciousness of the individual at any given point in time, let alone within the gift of the researcher’s knowledge, introducing a further level of complexity.

McKenna and Richardson's (2007) focus on professionals makes explicit an assumption that has dominated the literature – that most of these globally mobile people are highly educated professionals or engaged in managerial roles. This assumption is open to debate, since other occupational groups including skilled workers, for example electricians, construction workers, or hairdressers choose to self-initiate their expatriation to another country. Engaging in this line of thinking is important as it directs our attention quite clearly to the heterogeneity of SIEs as a larger group.

Returning to the premise of the original paper on the differences between overseas experience and corporate expatriation (Inkson et al., 1997), the motivation for mobility was primarily adventure and the desire to experience other cultures rather than career development per se. Other studies on SIEs including professional and non-professional populations have made similar observations (Doherty et al., 2011, Richardson and Mallon, 2005, Thorn, 2009b). In this respect, we contend that when defining SIEs, a focus on career development as a primary driver would be misplaced. Nonetheless, we must also be cautious not to overlook the extent to which career remains a necessary dimension of SIE and acknowledge the centrality of career competencies, skills and experiences for facilitating and supporting this type of mobility. We suggest that being able to secure employment – be it in a professional or non-professional role – is in most (if not all) cases a key feature of SIE. Thus, while career might not be a primary 'driver', it may well be the vehicle through which SIE is realized. A focus on, or at least some engagement with, the influence of career is, we argue, appropriate.

Accepting and engaging with (rather than denying) the complexity of SIE, we are nonetheless mindful of Suddaby's assertion that any definition must avoid tautologies and should be parsimonious. These are both essential attributes since a definition that lacks clear and

identifiable characteristics creates confusion rather than clarity. It also limits our ability to distinguish between SIEs and other related concepts such as corporate assignees and immigrants. It is therefore useful at this point to recognize the tautology that has arisen in the evolution of SIE as a field of study. The populations that have been studied have determined the definition, rather than there having been a clear delineation of what an SIE is from the outset. As an example, the original paper by Inkson et al. (1997) focused on New Zealanders, and as any other country is 'overseas or abroad' for these people, this became part of the terminology. For Suutari and colleagues (Suutari, 2003, Suutari and Brewster, 2000) 'overseas' was not relevant, so was replaced by 'foreign'. Thus, the construct of SIEs has predominantly been driven by and emerged from the data in a constructionist mode rather than having been based on theoretically-driven a priori assumptions about the construct parameters. While both these approaches are legitimate in the development of theory, a data-driven approach does lead to definitional concerns. In any new field of study, an emerging process of definition and construct development is to be expected. However, we are now in a situation where we are still seeking, perhaps belatedly, for the much needed clarity of who is (and just as importantly, who is not) part of the research field. In order for the field to mature we contend that clarification and stabilization of terminology and particularly 'concepts in use' is now a matter of urgency.

## **Scoping the field of self-initiated expatriation**

Moving on from the clarity of definition, we turn to Suddaby's (2010) next element of construct clarity – the need to clearly signal the boundaries for the application of a construct. Addressing the issue of boundaries, draws our attention to the contextual conditions impacting on the extent to which a given construct can be applied. It is particularly necessary with constructs proposed as universal, to specify the boundary limitations or scope conditions which underpin the theoretical argument on which a construct is based (Suddaby, 2010, p, 349). Suddaby identifies three general categories of scope conditions – space (where the construct is located and the extent to which it can be transferred or generalized to other spaces), time (when the construct was assessed and the extent to which it can be applied to other time periods) and values (the extent to which a concept reflects the researchers' underlying ontological and epistemological assumptions). A core theme here is the need to signal the degree to which our research constructs are socially constructed and contextually specific. Thus, it requires us to acknowledge the spatial and temporal parameters as well as the potential influence of the researcher's orientation on the scope of the SIE construct. We attend to each of these issues next.

Level of analysis is an important component of space. When we consider research conducted on SIE thus far, many scholars have adopted an essentially individual level focus exploring the experiences of individual SIEs and developing an 'emic' understanding of the SIE experience (see, for example, Doherty et al., 2011, Richardson and McKenna, 2006). While there is significant merit in exploring the experience and exposing the characteristics of the population at the individual level, within the management literature in particular, there is increasing recognition of the importance of the SIE at an aggregated level (e.g. the organizational, labor market or country level) (Thorn and Inkson, 2012, Collings et al., 2007).



Thus, for example, Suutari and Brewster (2000) have suggested that given their potential role as national and organizational resources, SIEs must be managed in a way that maximizes their individual performance and thereby enhances their contribution at the collective level. Doherty and Dickmann (2012a), rehearse the talent management and career challenges of achieving this. Clearly defining the populations under study is a key step in being able to maximize the comparative utility of research findings and the application of research to practice.

Addressing the idea of ‘scope’ further, the cultural context of the research is another important aspect that needs to be explicit in SIE research. Much of the research to date has centred either on individuals from particular countries (for example, New Zealand (Thorn, 2009a), Finland (Suutari and Brewster, 2000), and the UK (Doherty et al., 2011)) or on self-initiated expatriates within one geographical location (Crowley-Henry, 2012, Al Ariss and Özbilgin, 2010). Research which considered SIEs operating in different cultural contexts was undertaken by Richardson and colleagues, using samples of individuals who had self-initiated to four culturally diverse locations; New Zealand, Singapore, Turkey and the United Arab Emirates, to account for the impact of cultural distance on their experiences (Richardson and Mallon, 2005, Richardson and McKenna, 2006). While this body of research marked a useful starting point, further research comparing SIEs in different cultural contexts (for example, Thorn, 2009) and/or comparing SIEs from different cultural contexts in the same location (for example, Richardson et al., 2008) is necessary to advance our understanding of SIE. Such comparisons would be particularly useful for identifying the impact of context on the SIE experience, a theme which remains relatively unexplored.

Turning now to the ‘temporal’ aspects of scope, where it is important for the researcher to be explicit about the temporal scope under which the construct is assumed to operate (Suddaby, 2010), we are mindful of Suddaby’s (2010) cautionary note that “management theorists tend to ignore the temporal boundaries of phenomena and assume invariance over time” (p.349). Temporal boundaries are particularly important to the study of SIE(s) and to the theoretical and empirical applications of research on this phenomenon. One of the key definitional dimensions of SIE is ‘length of time in the host country’, and more precisely **anticipated / expected / or eventual** duration of stay. We suggest that this temporal condition is definitive in determining whether an individual can be considered an SIE. As noted above, the key concern here is the assumption that the period of time spent outside the home country will be temporary rather than permanent, thus while the individual is undertaking an intentionally temporary stay in a location outside their home country, they can be deemed self-initiated.

Yet, as the field evolves it is notable that this assumption is underpinned by a further caveat - that the degree of temporariness varies between individuals. Thus, we recommend that researchers remain aware that expected duration of stay and actual duration are not synonymous. Defining the ‘temporal scope’ further, expected length of stay and actual length of stay should be incorporated into how we understand the SIE construct. In particular, it should be acknowledged as a source of heterogeneity both at the individual and aggregate level.

We flag the issue of temporariness as a key boundary defining element in the construct. For example, an SIE who has been living in their host country for several years could be considered to be showing an intention to stay in the host country which if acted upon, would then categorize them as an immigrant and not an SIE. We suggest that such individuals need

to be clearly distinguished from, for example, a person who has recently arrived and expects to stay only a year or so. Length of stay is a variable which potentially impacts the extent of adjustment, identity and establishment, since these may differ for the person who has been in the country for a longer period compared to those who are newly arrived in a host country. Hence, any research on SIEs must include this temporal variable, to ensure that appropriate comparisons are being made.

The status of an individual living and working across international boundaries can also be subject to variance over time. Consider the scenario where an American multinational company sends a female employee to the UK for two years. Quite clearly, she is, at this stage, a corporate expatriate. However, before the end of the two year period, she chooses to leave that employ, and takes a job with another company in the UK. Some scholars may argue that the individual is now a SIE, since she is living outside her home country (an expatriate) and the decision to remain the UK was clearly of her own volition. We, however, would suggest that the individual now does not fit either category. If we return to the two essential components of SIE - relocation across a national border (which has not occurred in this transfer of employment) and individual volition (which has occurred), we must conclude that the individual is no longer a corporate expatriate, but also not an SIE. This scenario is illustrative of how individual status can change over time, reinforcing the significance of the temporal aspect. Also this highlights that we need to ensure we are clear about our population descriptors. In this example, the focus on who initiated the relocation across the international boundary becomes paramount. Continuing our focus on the temporal variable we suggest that extrinsic conditions are also an important consideration. Thus, for example, a study of SIEs conducted during an economic crisis in one country must be differentiated from studies conducted during an economic boom since such extrinsic temporal conditions may impact the

individual decision to choose a particular location and may influence the length of their stay there. Hence, authors in the field need to recognize the dynamic nature of SIE, and ensure they have clearly bounded their populations and define the temporal parameters of their studies.

The third aspect of scope is what Suddaby (2010) refers to as constraints of value, or the ‘scope considerations that arise as a result of the assumptions or the world view of the researcher’ (p. 350). He calls for a position of ‘critical reflexivity’ (p. 350) in conducting research. It is interesting to reflect on the fact that many prominent authors writing on SIEs are either living in a country other than their home country (e.g. Richardson, Doherty, Al Ariss, Dickmann, Inkson, McKenna, Bozionelos, Baruch), or have spent considerable periods living and working outside their home country (Crowley-Henry, Selmer). This may be a function of the international evolution of academic careers (Bauder, 2012, Welch, 1997) and/or recent pressures on academics to engage in international mobility (Ackers and Gill, 2008). In a literature where SIEs are mainly portrayed as a privileged group among expatriates in managerial career positions, and migrants tend to be viewed as unskilled individuals or somewhat inferior (see Al Aris and Crowley Henry, this issue), the researcher may prefer to affiliate as an SIE rather than a migrant, and this could alter the definitional perspective they adopt. Taking this critical perspective a step further, we should be aware of the potential tendency to focus on people like ourselves and/or understanding our research subjects ‘as if’ they were just like ourselves.

There has been a rapid expansion of the SIE literature with many authors who have traditionally focused their research on corporate expatriation or migration now turning their attention to SIEs. This trend brings our attention back to the relationships between constructs

and demonstrates how some scholars have extended their study of corporate expatriates to related constructs, in this case SIEs (e.g. Doherty, Dickmann, Suutari, Brewster, Janssens, Bozionelos, Cerdin, Selmer) or immigrants (Richardson and Zikic).

### **Relationships between constructs**

Constructs do not simply exist in isolation from each other (Suddaby, 2010) and as illustrated above, they develop over time, and invariably exist “in referential relationships, either explicit or implicit, with other constructs and with the phenomena they are designed to represent” (p, 350). We have already noted above how the term ‘SIE’ has a ‘historical lineage’ (Suddaby, 2010, p. 350) evolving in juxtaposition to, and expanding on, the more established term of ‘corporate expatriate’. The SIE concept is a distinct, separate (albeit related), field of study. A key concern for our understanding of the term SIE is to signal the ‘logical connections’ between SIE as the ‘new construct’ and corporate expatriation as the pre-existing construct. Therefore, while the field has evolved owing to putative differences between SIEs and corporate expatriates, the similarities and relationships between these constructs must be acknowledged. Clearly, both SIEs and corporate expatriates belong to the broader grouping of ‘expatriates’ defined as individuals who are living outside of their home country on what they expect to be a temporary basis. However, the distinction between them is that SIEs have not been *sent* to the host country by an employer, rather they have elected to go under their own volition.

We contend that while the exact nature of the relationship between these constructs appears fluid and composite, there is a need for an organizing framework of the key characteristics to define the possible populations for study. Table 1 sets out these key factors which we identify from theory, the literature and the research base to date as significant to clarifying these

constructs. We organize our framework according to eight different dimensions. Dimension 1: ‘Initiation’ – the source of the impetus for mobility: Dimension 2: ‘Goals’ – the objective of the intended outcome of the move: Dimension 3. ‘Funding’ - the source of funding to enable the international move: Dimension 4. ‘Focus’ – the predominant motivators or drivers of mobility: Dimension 5. ‘Career agenda’ the relative status of career in the decision to move and the career impact of the experience, Dimension 6. Intended duration; intended period of stay abroad: Dimension 7. ‘Employment’ - the type of employment engagement; and Dimension 8. ‘Occupational category’ - typical occupational types.

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Table 1 about here

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The conceptual difference between the groups notwithstanding, an underlying constant is that they all ‘belong’ to the larger group of internationally mobile individuals. However, a fundamental factor in distinguishing these constructs is, we argue, the initiation of the relocation to the new ‘host’ country. The Table shows that initiation can come from the company, at one end of the spectrum. Moving along the spectrum, while the initiative to expatriate may come from the individual, they may receive encouragement, sponsorship or support from an employer. At the other end of the spectrum the driver for expatriation is firmly located within the respective individuals (the potential impact of family and other significant others accepted). While this is the primary distinguishing factor, we suggest that there is a range of other salient criteria which apply to variations in the SIE theme. The additional criteria indicate the increasingly complex range of variables to incorporate into how we distinguish between mobile populations. They also draw our attention to the complexity and diversity of expatriation as a process. What is clear from this table is that all

of the concepts – Flexpatriate, Expatriate, Organizational SIE/Seconded, SIE, OE, International Student and Migrant are similar in some dimensions and yet different in others.

One notable observation from this table is that the defining characteristics of each of the respective constructs vary minimally. These degrees of separation are indicative of the complexity involved in describing and defining mobile populations and the range of constructs available. Thus, for example, on the ‘initiation’ dimension, the SIE can be distinguished from the flexpatriate, and the expatriate by virtue of the fact that they have initiated their own expatriation. Between these is the organizational expatriate, who, although initiating their own relocation, get some company assistance when making the move. Similarly, on the ‘goals’ dimension, the constructs are distinguishable as they can be focused on predominantly ‘individual’ or ‘company’ outcomes.

We suggest that another key criterion in the table that connects and distinguishes the SIE from other related concepts is the issue of ‘funding’. From the original classification (Inkson et al, 1997) and subsequent expansion (Howe-Walsh and Schyns, 2010, Suutari and Brewster, 2000) funding has been distinguished as either organizational or self. Within this definition SIEs fund their own relocation and related expenses themselves, from the airfare, all requisite documentation, to post-expatriation expenses such as accommodation, familial support (e.g. children’s education) and eventually costs of repatriation. More recently, researchers have identified those individuals who receive some organizational support but who continue to meet the criteria that initiation comes distinctly from the individual (e.g. Altman and Baruch, 2012). This would mean that people who apply for jobs in other countries, but who may receive some assistance in the relocation (for example, airfares, or some accommodation in the host country) we suggest, would be classified as SIEs but fall within the organizationally

supported range of the spectrum. This is a clear example of where the empirical base has moved ahead of theoretical and conceptual development of the construct.

Table 1 also addresses Suddaby's (2010) fourth and final element that 'the construct, its definition, its scope conditions, its lineage and its relationship to other constructs must all make sense' (p. 351). It provides a range of criteria which will help to distinguish the populations falling within (and outside) the construct of self-initiated expatriation with the aim of clarifying both the constructs in use and the populations which have been and may be studied.

## **Discussion**

### **Connecting the study of SIE with contemporary career theory**

In order for a field of research to mature, it must extend beyond description towards theory building. As it stands, the current body of literature on SIEs has made some move in this direction with several authors connecting their research findings to existing theories in related fields (see, for example, Jokinen et al., 2008, Richardson et al., 2008, Tharenou and Caulfield, 2010). However, to ensure further maturity, a more robust corpus of theory is required. We suggest that a relevant and rich ground for SIE scholars to draw on and contribute to is the careers literature and contemporary career theory. We have already identified the extent to which 'career' permeates the reported drivers for and experiences and evaluations of SIE as a form of international mobility. Research to date indicates that while career is not a central concern to SIEs, they are engaged in gainful employment and have varying career outcomes from the experience (Doherty and Dickmann, 2012b). So career, perhaps in the more holistic meaning, is an important element of the SIE experience at the individual level (Doherty et al., 2011, Thorn, 2009b). Career from an organizational level



perspective is also important, in particular to the engagement and performance outcomes of SIE (Mayrhofer et al., 2008, Thorn and Inkson, 2012). Indeed in drawing the relevance of SIE to organizational attention, career becomes a focal point of concern and importance as the terrain in which the relationship is played out (Inkson and King, 2011). We suggest that connecting SIE research to career theory is therefore a key imperative for SIE scholars and is a necessary step towards developing and building theoretical perspectives as well as establishing parameters which can frame theory testing.

Exploring the idea of drawing on and contributing to career theory further, one useful starting point is to consider whether SIE researchers might make a contribution to our understanding of the ‘boundaryless career’ as a dominant influence on contemporary career scholarship (Briscoe et al., 2006, Inkson et al., 2012, Sullivan and Baruch, 2009). They might, for example, be well placed to answer calls for a more critical exploration of the concept (Inkson et al., 2012, Pringle and Mallon, 2003), and extend their contribution to career theory more generally. Moreover, exploring the value of boundaryless career theory for understanding the experiences of SIEs and SIE would help to address Pringle and Mallon’s (2003) other recommendation that the boundaryless career concept needs to be applied to more diverse populations. Thus, we see again here, potential for SIE scholars to make a theoretical contribution.

While there is still some way to go in this direction, some SIE scholars have made a start by examining the potential synergy between boundaryless career theory and the experiences of SIEs, including skilled workers such as nurses (Bozionelos, 2009), highly educated individuals (Doherty and Dickmann, 2012a), managerial populations (Biemann and Andresen, 2010) and in particular SIE academics (e.g. Richardson, 2009, 2012, Richardson

and Zikic, 2007). Taking each of the six dimensions or emphases of the boundaryless career (Arthur and Rousseau, 1996), Richardson (2012) has concluded that “While there are strong synergies between each of the six emphases and SIE academic careers, they are not a direct fit. Rather, the connection between them is more nuanced....” (p, \*\*). Her main argument is that SIE academic careers like careers in other spheres (King et al., 2005) can be *both* bounded *and* boundaryless rather than either one or the other. This offers a more critical perspective suggesting that whereas SIE may, by its very nature, involve crossing national boundaries, further institutional and disciplinary boundaries may be more difficult to cross. Thus, for example, drawing on the Ackers and Gill (2008) study of Italian academics seeking to return to Italy after expatriating to the UK, she notes that the experience they gained in the UK was ‘not recognized’ which inhibited their ability to find a position in the Italian job marketplace. It is notable that this argument echoes previous work by Begley et al. (2008) suggesting that experience gained in one country may not be ‘recognized’ by organizations on repatriation.

Similarly, while there is widespread evidence that some SIE academics may see themselves as having a ‘boundaryless future’ (the sixth dimension or emphasis of a boundaryless career), contemporary careers are in fact more bounded than contemporary boundaryless career theory suggests (Rodrigues and Guest, 2010). The critical point here, therefore, is that SIE academic careers and perhaps SIE careers more broadly may be less about *boundarylessness* than about *boundary crossing* (Inkson, 2006). This supports Inkson et al.’s (2012) call for ‘boundary-focused careers scholarship’ (p, 325). Further, SIE can create boundaries. Many New Zealanders living and working in the global environment, for example, would love to return to their home country, primarily for the quality of life and for family relationships (Thorn, 2008). However, they find they cannot obtain the challenging work experiences or

the high salaries that are offered in larger economies, back in New Zealand. As time passes, then, SIEs may find that they are bounded to the host country through their children's education and developing social networks (Rizvi, 2005, Suutari, 2003). Ironically, the very boundaryless move across international borders can result in a bounded and restrictive future. We believe that there is, therefore, a clear opportunity here for SIE researchers to contribute to contemporary career scholarship by contributing to a more nuanced development of boundaryless career theory.

Another dominant concept in career theory is the 'intelligent career' (Defillippi and Arthur, 1994, Inkson and Arthur, 2001), based on the concept of 'three knowings' - 'knowing why, knowing how and knowing whom'. While this theory has already been applied by scholars exploring the career experiences of corporate assignees (Cappellen and Janssens, 2005, Jokinen, 2010), there is room for it to be applied to the SIE experience. Indeed, the 'knowing why' of an SIE career has already been examined in those studies seeking to identify the 'motives' for SIE (e.g. Doherty et al., 2011, Thorn, 2009b) and the outcomes of the experience (Jokinen et al., 2008). Further research, therefore, might examine potential connections between the three 'knowings' and the SIE experience, for example how the 'knowing why' of SIE might impact (or otherwise) on the subsequent 'knowing how' and 'knowing whom'. Inkson et al. (2004) explored knowing why with New Zealand SIEs. Drawing on McClelland's (1961) concept of achievement motivation, they found that those who value achievement, money and influence were more likely to stay abroad than those who valued family, friendships and lifestyle. The implication was that those who valued the first three were most likely to be the entrepreneurs and innovators, so those who chose to be SIEs are perhaps one of the most valuable groups of people within a nation.

The theme of ‘knowing who’ in SIE also draws our attention to career networks, a well-established area of careers research (Chiu et al., 2009, Cotton et al., 2011, Shen and Kram, 2011). Thus, for example, taking Granovetter’s (1973) conception of ‘strong and weak ties’ with home and host countries, SIE scholars might investigate the impact of such ties on opportunities to engage in SIE and subsequent experiences and evaluations of that experience.

## **Conclusion**

The purpose of this paper has been to seek clarification of the SIE construct, to facilitate the further exploration of the construct. We do not purport to have a prescriptive definition of SIE, but we do hope our thoughts will serve as a basis to extend the dialogue. We have applied Suddaby’s (2010) paper as a template for dissecting the components of SIE and aligning it with related constructs. We draw attention to the fact that the SIE literature, is growing, but seems to be developing without a clear basis. It is time to capitalize on the interest in SIEs, to define and refine its boundaries, to ensure the development of theory. The links between SIEs and career theory are clear, and there are new avenues of research created by such a connection. Here we have attempted to set a path for concept clarity and highlighted just a few of the areas with significant potential for further exploration of this fascinating population of individuals.

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Table 1 – A Spectrum of Global Mobility

| Dimension                          | Corporate focus —————> Individual focus   |  |  |  |  |  |                       |  |
|------------------------------------|---|--|--|--|--|--|-----------------------|--|
|                                    | Short-term/<br>Flexpatriate   | Expatriate   | Organizational SIE/<br>Secondment                            | Self-initiated<br>Expatriate                   | OE   | International students                           |                       | Migration                              |
| <b>Initiation</b>                  | Company directed  | Company directed   | Self, but with company sponsorship                           | Self   | Self   | Family/<br>self                                  | Family migration plan | Family/<br>self                        |
| <b>Goals</b>                       | Company projects  | Company projects   | Company projects   | Individual                                     | Individual                                   | Individual                                       | Family                | Family/<br>individual                  |
| <b>Funding</b>                     | Company salary & expenses   | Company salary & expenses                                    | Some relocation assistance                                   | Private  | Private                                      | Private  | Private               | Private                                |
| <b>Focus</b>                       | Career  | Career   | Career   | Career/Adventure                               | Career/Adventure                             | Education  | Migration             | Migration                              |
| <b>Career impetus</b>              | Structured/<br>Traditional  | Structured/ Traditional                                      | Structured/ Traditional                                      | Planned  | Opportunistic                                | Developing                                       | Developing            | Developing                             |
| <b>Intended Duration</b>           | Short, non-residential  | Non-permanent  | Non-permanent  | Non-permanent                                  | Non-permanent                                | Non-permanent                                    | Leading to Permanent  | Permanent                              |
| <b>Employment</b>                  | regular   | regular  | regular  | regular  | casual                                       | Casual, if any                                   | Casual, if any        | Any                                    |
| <b>Occupational Category</b>       | Usually Professional  | Usually Professional   | Usually Professional   | Any  | Any  | None   | None                  | Any                                    |
| <b>Example/s in the literature</b> | (Mayerhofer, Müller, & Schmidt, 2011; Mayerhofer, Schmidt, Hartmann, & Bendl, 2011) | (Harvey & Moeller, 2009; Lazarova, Westman, & Shaffer, 2010) | (Altman & Baruch, 2012; Blenkinsopp, Baruch, & Winden, 2010) | (Doherty, et al., 2011; Jokinen, et al., 2008) | (Inkson, et al., 1997; Myers & Inkson, 2003) | (Salisbury, Umbach, Paulsen, & Pascarella, 2009) |                       | (Arango, 2000; Castles & Miller, 2003) |



# Self-initiated expatriation and self-initiated expatriates: Clarification of the research stream

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