Understanding the self-initiated expatriate – a review and directions for future research

The study of self-initiated expatriates has gained pace in the last decade focusing on these individuals, their motivations, their behaviours and their relevance to the global workforce. Published works produced between 1996 and 2011 are reviewed. A thematic analysis indicates that key topics of focus in current research cover: characteristics of the self-initiated and their work related experiences and management; comparative studies of company backed versus self-initiated expatriation and the self-initiated as global talent flow. This article identifies a need for clarification of the construct of SIEs, expands on the theoretical perspectives used to examine SIEs and offers a framework to facilitate coherence in the direction of future research and the application of knowledge to practice in this field of study.

Introduction

Some individuals take the initiative, independent of an employer, to move to a foreign location for employment, career and/or travel or lifestyle reasons. These people have been referred to in the literature to date by a variety of terms, typifying them and their behaviours. Terms include 'overseas experience' (OE) (Inkson, Arthur, Pringle and Barry, 1997); 'self-designed apprenticeship' (Arthur, Inkson and Pringle, 1999); 'free travelers' (Myers and Pringle, 2005); 'self-initiated foreign work experience' (SFE), (Suutari & Brewster, 2000) and latterly 'self-initiated expatriate' (SIE) (Jokinen, Brewster and Suutari, 2008). This vocabulary refers to people who expatriate from their home country without the support of an employing company (Inkson and Richardson, 2010) and the abbreviation SIEs is used in this paper to denote these individuals.

There are various mobile populations in the international context (OECD, 2011) among which are SIEs. The initial categorization of SIEs presented by Inkson et al., (1997) described them as self-initiated by personal funding, with personally oriented development and career goals. Suutari and Brewster (2000) expanded the definition by adding employer and task related information to the description of the behaviours of SIEs. Subsequently Al Ariss (2010) drew attention to factors such as location of origin and destination, sense of agency in the choice of destination and status in the host country as key to distinguishing self-initiated and migrant populations. Howe-Walsh and Schyns (2010) added the further variables of country and organizational culture and job characteristics to differentiate SIEs from organizational newcomers with prior job experience (p 262) to identify the different HRM and employee needs of these two groups.

To date, individuals studied under the banner of SIEs have included samples of young university alumni and volunteers (Hudson and Inkson, 2006; Inkson, Thomas and Barry, 1996; Tharenou, 2003), graduate engineers (Suutari and Brewster, 2000), managers and professionals (McKenna and Richardson, 2007; Suutari and Taka, 2004) academics and the highly educated (Richardson, 2006; Richardson and McKenna, 2006; Thorn, 2009; Schoepp and Fortenlechner, (2010) and other professionals (e.g. Tharenou and Caulfield, 2010). In fact most studies on SIE so far, have drawn on samples of well-educated, young individuals, holding professional positions, who have moved between developed countries (for example New Zealand, the UK, Finland, Canada and Australia). Therefore, research has focused on what might be considered a particularly select group of people who choose to be mobile.

However, some scholars have raised the concern that the academic literature does not address fully the range of individuals who undertake an international career path, for example, as well as SIEs, immigrants are globally mobile (Al Ariss and Özbilgin, 2010; Zikic, Bonache and Cerdin, 2010). While these authors suggest that the lack of focus on immigrants and other mobile populations is an omission in the scope of current research, it perhaps highlights a much more fundamental issue. The term SIEs has been used to describe a diverse range of individuals, but categorizes these people as a collective group (Morgeson and Hofman, 1999), without clearly outlining how the construct of SIEs is defined. To date, the empirical base has been mainly data driven and research and published papers have shaped the evolution of the concept of SIEs. This appears to have led to a lack of clarity in the construct of SIEs and in what distinguishes them from other mobile populations thus blurring the boundaries with groups such as immigrants. On

one hand samples have included individuals who at a micro level share some common characteristics. On the other hand there is considerable heterogeneity within and across the samples of SIEs with respect to individual and contextual level variables. Published studies develop a necessary conversation on differentiating mobile populations and identifying those who are subsumed within and those who fall outside the categorization of SIEs. Since many published studies were not based on an agreed definition of SIEs, comparison across samples is difficult and given the range of participants any similarities and differences in findings may simply reflect the samples polled (Janssens, 2010). Following guidance from Suddaby (2010) on achieving construct clarity, there is a need for clearer definition of what constitutes the construct of SIEs.

Achieving clarity includes stating the conditions and the levels of analysis under which the construct may be applied. Moving forward, at a minimum, studies focusing on SIEs need to clearly state the sample parameters, which include demographics, individual agency in instigating a move, intention to repatriate, home and choice of host location, in particular specifying whether the move is between developed countries or between developing and developed countries. Additional information about the occupational roles of SIEs and the frequency of their moves would help to build knowledge on the work related experiences of these individuals and develop what we currently know about the characteristics of SIEs and their behaviours.

Theoretical constructs which have been applied in the study of SIEs include motivational drivers for mobility (e.g. Thorn, 2009), adjustment (e.g. Begley, Collings and Scullion, 2008;

Peltokorpi and Froese, 2009), career anchors (e.g. Cerdin and Le Pargneux, 2010), capital (e.g. Al Ariss and Jawad, 2011) and career capital (e.g. Jokinen et al, 2008). While these works shed light on some aspects of SIEs, there is no clear framework to help synthesize this body of knowledge. It would be helpful to show how these publications contribute to an understanding of the experiences of SIEs or their potential role in organizational or global contexts or to indicate how these studies link together. Following Rousseau, (1985) and Rousseau and House, (1994), a conceptual framework is offered which suggests multiple levels of analysis. This framework proposes that SIEs may be studied as individuals in their own right at the micro level (psychological/individual level experiences); they can be examined as a source of global talent at a macro level (socioeconomic processes) and may be investigated as an organizational resource at a meso level (organizational context). This can be used as an organizing framework, to guide theoretical development and to sharpen the focus of future empirical research efforts on this topic. The research stream on SIEs continues to grow apace (Doherty, 2010) so it is imperative that there is coherence in the use of the terminology alongside an appraisal of current knowledge.

The research stream

This paper draws on publications which specifically use the terminology of *self-initiated* and focus on the experience of SIEs as distinct from other forms of mobility, in order to draw a boundary on the review and explore how these individuals have been characterized and studied to date. The data sources targeted were Business Source Premier (EBSCO host); ABI inform (Proquest); PsycINFO; Emerald and Web of Science. A total of 49 articles published between 1996 and 2011 subsequently contributed to the synthesis presented in this paper. This review

indicates a surge in publications, signaling rapid growth in academic interest and effort in studying SIEs, as a global phenomenon.

When viewed chronologically papers considering the experiences of SIEs have emanated mainly from the antipodean region and emerged alongside developments in career theory such as the boundaryless career (De Fillippi and Arthur, 1994) where individual agency underpinning mobility is a key concept (Arthur and Rousseau, 1996). In Australia and New Zealand it is relatively commonplace for young people to undertake a period of self-initiated work, study and travel abroad. This is almost a rite of passage or *personal odyssey* (Inkson et al., 1997, p 352) with macro-level implications for the potential exodus of talent from this region (Carr, Inkson and Thorn, 2005; Jackson, et al., 2005). Publications subsequently extended to Europe with the study of Finnish engineers (Suutari and Brewster, 2000), a limited number of studies on SIEs in the Middle East (Bhuian, Al-Shammari and Jeffri, 2001; Bozionelos, 2009), Asia (Vance, 2002) and some empirical work considering international faculty of various nationalities who moved to Canada (Richardson, McBey and McKenna, 2008). More recent studies have ranged across populations in France (Crowley-Henry, 2007), Japan (Peltokorpi, 2008), and various other European locations (Biemann and Andresen, 2010; Selmer and Lauring 2010, 2011: a, b; Doherty, Dickmann and Mills, 2011).

While research on the traditional expatriate experience has tended to follow the global assignment cycle focusing on recruitment and selection, preparation for assignment and latterly repatriation (Harris, Brewster and Sparrow, 2003), drawing on samples of employees supported

by organizations (for example Dickmann, Doherty, Mills and Brewster, 2008; Stahl and Cerdin, 2004), research on self-initiated expatriates has not flowed in such a logical sequence.

Therefore, in order to explore the knowledge base on SIEs, publications contributing to this paper were reviewed under the categories of: study focus, theoretical basis, methodologies and samples, findings and stated contributions and gaps or areas for future research identified. This approach facilitated a synthesis of the key themes emerging which are organized by macro, micro and meso-levels of analysis (Rousseau and House, 1994). Within the publications reviewed, the first theme relates to an array of studies at the micro level that consider facets of SIEs individual characteristics and experiences. At a meso-level, a second theme draws on research exploring aspects of the work related experience of SIEs and their integration within the organizational context. The third theme considers how SIEs may contribute to the ebb and flow of talent globally, considering factors at a macro-level. (A summary of published papers is included in Appendix 1.). A synthesis of the three themes is presented below. This synthesis of the literature enabled the identification of the constructs and variables used in current studies and those that may usefully contribute to future research as outlined in Table 1.

SIEs - micro-level capabilities

A significant factor recognized in publications on SIEs at the micro level concerns the relationship between mobility and motivation to undertake expatriation. Drawing on the conception of push-pull factors, Baruch (1995) suggested that a range of drivers (economic, social or legal) push people towards a move or pull people back. Studies of the motivations of SIEs to move abroad have indicated that they are driven by a subjective inner sense of

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adventure, a desire to travel and to see the world, to meet career goals or as an escape from current circumstances (Thorn, 2009, Doherty et al, 2011). SIEs are considered self-reliant and autonomous, exhibiting diffuse individual development goals and valuing the cultural experience and opportunity for personal learning, as opposed to purely work experiences (Inkson, Arthur, Pringle and Barry, 1997). Factors such as a desire for exploration and excitement or a positive predisposition to the experience prompted by family and social connections or to escape from a current way of life or job were confirmed as key stimuli for those studied by Inkson, Thomas and Barry (1996) and Inkson and Myers (2003).

Three distinct motivational components: general exploration to see the world, (*explorer*), specific career goals, (*goal seeker*) or escape from an undesirable work or personal situation at home, (*escaper*) were suggested by Barry (1998). Suutari and Brewster (2000) suggested that the pool of SIEs is considerably diverse. Their sample of Finnish SIEs comprised six distinct sub-groups (for details see Suutari and Brewster, 2000, p 430-432) while an alternative classification developed by Jackson, Carr, Edwards, Thorn, Allfree, Hooks and Inkson, (2005) included economic factors (better opportunities/income); career (including vocational opportunities); family; lifestyle; cultural distance (similarity/diversity) and political environment as important drivers of mobile behaviour for those from the New Zealand context. They suggested that life-style and family considerations tend to be pull factors towards the home context while career, culture and economics operate primarily as push factors attracting people to move overseas. "Glocality" (Jackson et al., 2005; p 114) a term which refers to the economic prosperity and local context, has been highlighted as significant in determining individual motivations to move to a particular location. This is an important factor, since SIEs have agency

over where they move to and they may be drawn to host locations where economic and cultural environments are attractive or they may avoid moving to settings which are perceived as challenging.

Thorn (2009) found that there are a range of sub-motives including issues relating to career, cultural and travel opportunities and economic and personal relationships underlying the motivation to move abroad within her sample of New Zealand SIEs. This research indicated that the priority accorded to motives to move abroad varies with gender, location and life stage. This it is suggested creates different 'equations of motivation' (Thorn, 2009, p. 441), an important extension of our understanding of how SIEs make the decision to move abroad.

These studies of motivational factors and the categorizations and typologies have highlighted some commonalities across the samples polled, including the primary nature of a desire to explore and seek out new and valuable life and work experiences. They also indicate the complex nature of mobility motivations and behaviours. However they have not been replicated with other samples or used in the further study of SIEs therefore have not been used to capture additional knowledge on extend our understanding of within group similarities and/or differences. SIEs appear to engage in a complex decision-making process not unlike that identified for company-backed expatriates (Dickmann, Doherty, Mills and Brewster, 2008), but the evidence base on how these processes play out for SIEs still remains incomplete. In particular where there are challenges and potential barriers to international mobility, it has been suggested that the application of a combination of capitals; professional status, educational attainment, social networks and economic resources can be used in individual strategies to

overcome such barriers (Al Ariss and Jawad, 2011). Drawing on migration and self-initiated expatriation literature, these authors suggest the importance of contextual settings and individual circumstances in studying mobility. This work also suggests that there is a lack of attention to the potential changes that SIEs can experience in terms of status, for example potentially shifting from being SIEs to becoming permanent migrants. In addition to re-enforcing a need for concept clarity to distinguish populations as suggested above, this work points towards another topic that requires research attention. There is little focus on the possible transitions in status which SIEs may experience. For example, there is an opportunity to explore the shifts that SIEs may make between self-initiated, company supported and migrant status.

It may be that the potential for variations in the experience of SIEs' is due to the nature of the phenomenon which according to Inkson and Myers (2003) involves little planning and is often driven by serendipity. This was evident for British academic SIEs (Richardson and Mallon, 2005). Opportunities to expatriate arose by chance rather than as the result of a specific plan and when considering the option to move, desire for adventure, life-change and benefit to the family were primary incentives to work abroad. In addition, individual differences related to gender have been found to be important in shaping the behaviour of SIEs. Myers and Pringle (2005) suggested that for female SIEs, mobility experiences were intricately interconnected with their relationships while for men the decision to travel or take up job opportunities was not impacted greatly by relationships. Women more commonly sought less risky environments which afford them greater international career opportunity and reportedly more career benefit than men. Richardson (2006) exploring the pivotal role of the family for SIEs, suggested that expatriation

was a family decision, construed as a potentially very positive experience. SIEs interpreted their decision to relocate in direct relation to their family, particularly partners.

This was supported by Tharenou (2008) who suggested that willingness to go abroad was more impacted by family for women, and while career disadvantage can be a push factor, partner and family tend to be pull factors in the decision to move for women (Tharenou, 2010). Among the sample of academics studied by Selmer and Lauring (2010, 2011 a, b), both gender and marital status differentiated between the reasons to expatriate. Women were found to be less motivated by financial gain and life change. Positive relationships were identified between marital status and work effectiveness/performance but there was no moderating effect of gender. The gendered nature of some facets of the experience is an important issue worthy of further study. This would help to extend our understanding and interpretation of the relationship between gender and mobility among SIEs.

The generation of conceptual sub-groups has reinforced the heterogeneous nature of SIEs, the key factors prompting their decision to become mobile and the range of their experiences. The importance of motivational aspects for these individuals in terms of both relevance and significance to their mobility and to the economies of host countries and organizations still requires attention. Specifically there is a need to examine the relevance of SIEs as a corporate resource as discussed next.

SIEs as a meso-level corporate resource

Despite the increasing range of global populations beyond corporate expatriates which now populate the global labor market there is still a paucity of theoretical and empirical progress in the development of organizational resourcing strategies as recognized by Collings, Scullion and Morley, (2007). As a matter of fact, Collings, McDonnell, Gunnigle and Lavelle, (2010) suggested a need to broaden the focus beyond parent country nationals as the primary population of focus in international resourcing. The economic imperative which underpins this focus has developed against the backdrop of a need to cut the cost of traditional expatriate assignments (defined as those people who are sent by their organization to work in a location outside their home base for one year or more) which has an established literature (Evans, Pucik and Barsoux, 2002; Harvey and Moeller, 2009). For employees, concerns about aspects of company-backed expatriation such as specific locations which are perceived as challenging for example China, India and Russia (Brookfield, GMAC, 2010) or uncertainty about a direct career benefit (Kraimer, Shaffer and Bolino, 2009) appear to have diminished the allure of working abroad.

To overcome this companies have been expanding the use of alternative forms of assignment (Tahvanainen, Welch and Worm, 2005) such as frequent travelling, business trips and short-term assignments where employees often travel for short spells usually unaccompanied by family (Demel and Mayrhofer, 2010; Harris, Brewster and Sparrow, 2003; Welch, Welch and Worm, 2007) to meet the increasing demands of operating globally (Collings et. al., 2007). While some corporate employees may be reluctant to embrace mobility, other mobile populations including mobile professionals and SIEs appear willing and able to engage in mobile behaviour.

However, some authors (e.g. Mayrhofer, Sparrow and Zimmerman, 2008) portray SIEs as a challenge to HRM strategy, policy and practice. This contention is based on the rationale that since SIEs are individualistic and non-conformist, self-reliant, self-directed and proactive, operating with a high degree of personal agency and giving personal motives precedence in determining their psychological and physical mobility (Sullivan and Arthur, 2006), they may be difficult to manage. SIEs usually lack any organization specific track record which poses uncertainties similar to recruiting externally to the organization. Planning for this group can also be difficult as availability may not always match demand. It is implied that the distinct motivation patterns that drive SIEs and their potentially unpredictable commitment to the organization pose a challenge to HRM. Mayrhofer et al. (2008) also suggest that SIEs are problematic with respect to talent management since they may be less likely to stay long-term and therefore can challenge a long term retention strategy. This makes them a risky resource when it comes to human resource planning, recruitment and talent management. The proposed risk associated with employing SIEs appears to stem from two distinct sources discussed in the literature to date. These are lack of organization specific knowledge about SIEs and lack of adjustment to the host corporate culture.

On review, the actual evidence to support these conjectures is inconclusive and in fact some research has indicated that the individual traits of SIEs may be attractive to companies. Some studies show that SIEs appear to be adaptable to foreign environments. Peltokorpi (2008) found that work and non-work related adjustment of SIEs to Japan were impacted positively by their language proficiency, type of expatriation experience (company or self-initiated) and the

personality traits of emotional stability and cultural empathy. SIEs appeared to be better adjusted to the Japanese context perhaps because of higher motivation to move abroad and they understood other cultures as they had made a heavy personal investment in choice of destination. They also tended to remain longer which may facilitate more interaction and integration and therefore were more attuned to local behaviours.

While, in the past family adjustment or lack of adjustment, has been portrayed as a factor in prompting early repatriation among company-backed expatriates (e.g. Bhaskar-Shrinivas, Harrison, Shaffer and Luk, 2005), it is evident that family can be an incentive for SIEs (Richardson and Mallon, 2005). Broad learning experience and development opportunities perceived for family can be an incentive to move, and can have a positive bearing on how individuals evaluate the success of an international work opportunity.

In order to attract and retain SIEs, organizations need to more fully grasp what engages them so that appropriate process can be designed to address potential concerns about their management (Mayrhofer et.al. 2008). The current review highlights that a number of papers reporting the work related experiences of SIE suggest HRM approaches that may be appropriate to their management. Therefore one potential avenue in developing HRM policies and practices may be to build on the work of authors who have explored management issues relevant to the employment of SIEs. For example, Bhuian, Shammari and Jefri, (2001) who studied SIEs in Saudi Arabia, suggested that income may be a significant motivator to work in this context where there is the potential to engage in highly paid jobs for a short period of time. Job satisfaction and job variety are significant predictors of organizational commitment among this

sample while job autonomy appears negatively related to commitment. Recognition of the self-directed nature of SIEs and their commitment helps the interpretation of these findings and indicates the need for management practices that recognize these factors. The authors suggested that these variables are likely to be considerably influenced by local cultural factors and the nature of the contractual relationship experienced by SIEs in the Saudi Arabian context. Adding to research in the Saudi context Bozionelos (2009) found that for nurses, peer support was related to job satisfaction while mentor support was related to both job satisfaction and turnover intentions. This work indicates the potential importance of developing interpersonal ties as support mechanisms for SIEs in the nursing profession and Bozionelos suggested, for SIEs in general. It may be useful to develop both peer and mentor support opportunities for SIEs.

Focusing on volunteer SIEs Hudson and Inkson (2006) found that among their sample of New Zealanders there were high levels of openness and agreeability. They viewed their experiences as altruistic but also as an opportunity for challenge, adventure and change, valuing idealism, novelty and challenge. In particular SIEs may be a source of the soft skills which have been shown as important to effective functioning in the Third sector international context (Kealey, Protheroe, MacDonald and Vulpe, 2005) and the focus on technical skills apparent in the corporate resourcing literature (e.g. Collings and Scullion, 2008) may result in a missed opportunity to apply selection processes which value softer skills in the broader global business context (Earley and Ang, 2003).

Exploring the propensity to move, Richardson and McKenna, (2006), looked at allegiance among SIEs. They suggested that allegiance is a function of the relationships with the home and

host countries, a dynamic and fluid bond that influences both the desire to remain in the host country and to return to the home country. Family and social relationships appear to have a significant impact on the intention to stay or return. They propose that management strategies for SIEs should take into account the importance of family connections in the home country, possibly by providing return trips and should encourage interactions with host country nationals to address issues of "outsiderness".

Schoepp and Fortenlechner, (2010) also suggested that family related variables acted as a motivation to remain among SIE academic faculty in the United Arab Emirates (UAE). The UAE context appears to be supportive of family adjustment, however, a key factor to consider is that SIEs are a majority population with continued high demand for their skills albeit on renewable, three year visas in this specific context where there are indigenous labour shortages. Insights from the work of Richardson, McBey and McKenna (2008) indicated that a more holistic approach to recruitment incorporating realistic job previews and realistic living conditions previews were essential to the recruitment process to provide pragmatic advice on the potential reality of the move. Additional strategies were suggested by Fu, Shaffer and Harrison (2005), such as proactive socialization and positive framing. These enabled more effective coping and adjustment among SIE English teachers in Hong Kong.

Although based on a sample of young people moving abroad, Inkson et al. (1997) found that they reportedly undertook relatively unskilled, casual roles often below their capabilities. Subsequent research in the European context (Suutari and Brewster, 2000) also indicated that while expatriated roles were perceived as broader and more challenging, SIEs tended to work at

lower levels in the organizational hierarchy. Further exploration of the employment experience by Lee (2005) indicated that perceptions of under-employment related to lack of job autonomy, job suitability and job variety for SIEs moving to Singapore. The potential for underemployment may be alleviated by practices such as appropriate selection procedures which explicitly address job suitability and fit to the psychological contract. In addition those individuals who perceived fulfillment of the psychological contract were less likely to consider that they were under-employed. Under-employment was found to have a negative effect on job satisfaction leading to higher levels of work alienation and in turn lack of career satisfaction. Lee (2005) suggested that for SIEs this may lead to frustration at the inability to advance, a serious matter for the performance and effectiveness of employing organizations. Such perceived under-employment may have a potentially detrimental impact for the individual leading to frustration and disengagement, a challenge that practices attuned to the engagement styles of SIEs could help to redress (Doherty and Dickmann, 2012).

Under-employment is a theme echoed in the work of Begley, Collings, and Scullion (2008) on repatriation experiences of SIEs. They found that SIE repatriates perceived a negative value of international experience, since local (Irish) experience was favored by employers. This made re-entry into the labour market a characteristic struggle to re-build networks and re-acquire local experience, necessitating temporary work as an interim step to full time employment on return to the home country. Since SIE repatriates were not returning to a role within an organization, Begley et al. (2008) suggested that this adds to the stress of the repatriation experience.

Also exploring repatriation of SIEs, Tharenou and Caulfield (2010) considered host country push-pull factors, home country pull factors and shocks (significant events which prompt a re-evaluation of values, goals and purpose). Adapting job turnover theory they suggest that weak host country pull, strong home country pull and shocks motivate professionals to repatriate. Greater intention to return leads to increased job search efforts at home and directly motivates repatriation. This research resonates with repatriation intentions among company-backed expatriates (Bhaskar-Shrinivas et al., 2005) and merits further exploration. Indeed the challenges faced by SIE in repatriation are common to those faced by corporate-backed repatriates where there has been limited attention to organizational practice (Doherty, Brewster, Suutari and Dickmann, 2008). Both groups face problems of re-integration, re-assimilation and career continuation. In common with the findings of Begley, et al. (2008) for SIEs, the implied career benefits of a company-backed expatriation are often unmet on return (Doherty and Dickmann, 2009).

Despite some evidence pointing to potential strategies for the management of SIE, it has been suggested that companies are often not prepared or able to manage them strategically due to a lack of appropriate HR strategy, policy and practice (Howe-Walsh and Schyns, 2010). As yet the research base describing and explaining the ways in which companies currently manage SIEs is sparse. This has resulted in speculation about their role as organizational talent compounded by few attempts to benchmark good HRM practice for SIEs or forms of international assignment other than traditional corporate expatriates (Collings and Scullion, 2008). Within established frameworks on resourcing such as Lepak and Snell, (1999), SIEs may be subsumed within the contracting mode (Lepak and Snell, 1999, p 37) where their skills,

knowledge and abilities may be considered more generic and not strategic. For example, Suutari and Brewster, (2000) indicated that identifiable sub-groups of SIEs may form different types of resource for which organizations need appropriate approaches.

However, most practices applied by organizations tend to be 'ad hoc and pragmatic', (Howe-Walsh and Schyns, 2010; p 269). Howe-Walsh and Schyns, (2010) develop propositions on successful self-initiated adjustment based on the model developed by Black, Mendenhall and Oddou (1991). They argue that for different types of adjustment (work, interaction, general) different HRM practices are relevant and that these may differ between organizations and countries. The propositions in this theoretical piece require testing and in addition the paper provides further evidence of the need to consider the different levels of analysis required to study SIEs, to address the gaps in current knowledge.

Review of these publications indicates that there is considerable scope to explore the potential HRM strategies, policies and practices appropriate to the management of SIEs and how they might integrate with other corporate populations as an organizational resource. Studies comparing SIEs and corporate expatriates provide some insights into the potential similarities and differences between these two groups, and potential HRM approaches. This theme has limited publications, as reviewed below.

Comparative studies of SIEs and company backed expatriates

Comparative studies have considered SIEs and company-backed expatriates. Focusing on Finnish engineers, Suutari and Brewster (2000) found distinct differences between SIEs and

company-backed expatriates across 5 categories of factors including demographics, employer and task variables, motives, repatriation and future career and compensation. SIEs were slightly younger and significantly more often female, single or with spouses working abroad. They were more commonly employed, often temporarily within lower organizational levels, by a foreign organization such as the UN. The company backed expatriates tended to work in home country companies and experienced less variation in salary. They had more often an agreed position to return to and were more likely to believe that their international experience would be highly valued on return. Both groups were optimistic about reaping the career benefits of their experience while SIEs were more willing to accept another working period or permanent stay abroad.

Similar patterns were found by Sargent (2002) who surveyed Western expatriates moving to Japan. SIEs appeared to have a greater desire to go to the host country, were more able to integrate with local populations, and had better understanding of the language, and culture and potentially better adjustment than company backed expatriates. These findings connect to the issue of agency. SIEs are able to choose their host destination and these findings may reflect the considered choice of host country by SIEs which most company-backed expatriates cannot influence.

Considering the career capital acquired during expatriation, Jokinen et al., (2008) found that Finnish SIEs and company backed economics graduates perceived an increase in their career capital, in particular knowing how and knowing why. Knowing whom was significantly less impacted for SIEs possibly due to their lack of existing networks within the organization. Since

they tend to work at lower levels they may have fewer opportunities to grow those networks. Jokinen et al. (2008) suggest that the developmental potential of their expatriation experience is clearly powerful but the lack of research on their experience means there may be less well developed strategic approaches for SIEs, reinforcing the need to investigate the organizational strategies in place.

SIEs were found to display higher organizational mobility and intention to change organization than company-backed individuals in Germany (Biemann and Andersen, 2010). While the two groups showed no differences in levels of subjective and objective career success, SIEs showed a more stable career orientation in that their personal investment in career and career progression sustained over time. Company backed expatriates in this study showed decreasing career orientation with age. The authors suggested that this may be because since SIEs depend on external job offers they need to continuously plan the next career move themselves and are therefore more attuned to the need to be aware of the career moves they make and perhaps be more amenable to moving.

Adding to the empirical base on SIEs and company backed expatriate motivations to move, Doherty, Dickmann and Mills, 2011 found significant differences across a range of variables relating to location, host country and career factors as drivers of mobility. While corporate expatriates were more concerned with the job and career implications of the move, SIEs appeared to focus on the ability to adapt to the location and the reputation of the host country, displaying a possibly more cosmopolitan attitude to the experience while corporate expatriates were more focused on the potential career benefits.

Such studies provide evidence of the similarities and differences between these two populations highlighting that although SIEs seem to have higher mobility intentions and a propensity to move, there appears to be stability in their career orientation and potentially more planning in their approach to career moves. These insights add value to the body of evidence that is available to direct the development of appropriate HRM policies and practices which should take account of both the individual characteristics of SIEs but importantly focus on the more positive findings in research which highlight flexibility, adaptability and a desire to develop. Some data are available on variables such as length of stay abroad, the type of work roles engaged in, the organizational levels, the nature of the contractual relationships and the long-term career outcomes for SIEs, but there is scope to extend our understanding of these factors in relation to the development of HRM strategies, policies and practices. Further research would be useful to organizations in developing their approaches to the management of SIEs alongside the company-backed expatriate, including indices of impact on organizational capital through for example performance (for a critique of the issues inherent in measuring return on investment in international assignments see Doherty and Dickmann, 2012) and benefit to corporate capital (see for example Inkson and Clark, 2010).

In order to situate SIEs within an organizational context it is necessary to understand more about the strategic 'fit' of different populations and the appropriate HRM approaches needed. The research stream on the nature of SIEs as a resource is emergent and requires further theoretical and empirical development to establish the contribution that SIEs may make to competitive advantage. In particular, as suggested by Kraaijenbrink, Spender and Groen, (2010) different

levels of analysis (individual and organizational) need to be acknowledged as this may contribute to the seeming disconnection between the individual level capabilities of SIEs and their role as a corporate resource which can contribute to global talent flow.

SIE as a macro-level global resource and flow of talent

The growth in academic interest in SIEs and the experience of self-initiated expatriation, at least initially in published papers, appeared as an attempt to describe the phenomenon, driven by a desire to differentiate those engaging in SIE from those people who have had organizational support for their move abroad (Inkson Arthur, Pringle and Barry, 1997). With the continuing pressure on businesses to operate globally, there has been increasing reference to SIEs as a potentially significant resource in the global economy running through the published papers on this population (see for example Myers and Inkson, 2003; McKenna and Richardson, 2007; Doherty et al., 2011). SIEs can potentially bring fundamental benefits to host countries and organizations such as the creation of virtual networks of nationals located overseas who are also willing to provide their expertise to their home countries. It is suggested that the talent of SIEs can therefore be of benefit at national and institutional levels, if this population is acknowledged as being self-directed in their mobility and managed as a knowledge source embodying know-how, experience and network capital (Carr et al., 2005).

In fact Inkson et al., (1997) in contrasting SIEs with company sponsored expatriates argued that since those engaging in an overseas experience (OE) learn skills such as self-confidence and flexibility which are core human qualities in an open market driven economy, they could potentially represent a 'more important means of knowledge acquisition, individual enrichment

and national human resource development' (p 364) than the expatriate sent by an organization. This positions SIEs as a potentially significant group in the global talent pool from two perspectives. First at a micro level they hold particular skills, knowledge and abilities such as intrinsic motivation to be mobile within the global economy; they display initiative in moving away from their home base unsupported by an organization and possess the technical skills which give them leverage for employment in an international context. Second at a macro level they are already a part of the global workforce and contribute to the international economy, but there are issues at a meso level as illustrated by Jokinen, Brewster and Suutari (2008) who indicated that although a number of SIEs work within companies, they were not identified formally as expatriates, leading them to refer to SIEs as 'an almost hidden aspect of the international labour market' (p 979). A number of other authors have suggested that data on this group are limited (Begley, Collings and Scullion, 2008; Collings, Scullion and Morley, 2007; Suutari and Brewster, 2000). The lack of empirical data on the extent of self-initiation and the limited evidence of the type of contribution made by these individuals to the economy (Collings et. al. (2007), has led to suggestions that there is a need to track the ebb and flow of this talent, potentially through the use of standardized instruments to measure the scope and magnitude of SIEs (Jackson et al. (2005).

It should be noted that even for the established study of corporate expatriation, there has been criticism of the research base. Bonache, Brewster and Suutari, (2001) indicated that research on expatriation had failed to analyse relationships between strategy and policies and had studied the elements of expatriation in a disaggregated way. Issues regarding the utility of expatriation for both organizations and individuals still persist, for example the potential return on investment in

expatriation is unclear (Doherty and Dickmann, 2012; McNulty, De Cieri and Hutchings, 2009; Welch, Steen and Tahvanainen, 2009), raising questions about the value of corporate expatriation as an element in corporate talent management (Doherty, 2008).

Such criticisms can equally apply to the study of SIE. Although SIEs are discussed as a source of talent, they are difficult to locate within established frameworks of employment engagement (Lepak and Snell, 1999; Collings et al. 2007). Many organizations do not address strategically SIEs as a source of international labour and theory is still nascent in dealing with them as a global resource that can contribute an advantage, in an open market economy. There is little evidence of how organizations acquire SIEs or the extent to which the skills contributed by SIEs are matched to the organizational context. Exploring these issues would require determining the potential resource embodied in individual careers and how this links to the organizational level (Inkson and Clark, 2010) and research on manager's perceptions of SIEs to provide data on their performance relative to locals. Therefore for the study of SIE, the evidence base at a meso-level will benefit from the extension of the theoretical underpinning for the study of the individual-organizational relationship.

Connections with contemporary career

For SIEs, Jokinen et al. (2008) support the notion that the individual level career capital which comprises skills, knowledge, networks and motivations contributes to individual level performance and ultimately to organizational performance. Other studies implicitly consider the individual career competency of SIEs as an important global advantage (e.g. Biemann and Andersen, 2010). However, the theoretical foundation for linking individual and organizational

capital development is underdeveloped with notable exceptions such as Inkson and King, (2011) and Inkson and Clark, (2010) who explore how individual level career capital can contribute to the organization. As indicated by research on motivational drivers, although career considerations appear less central to SIEs, they are consistently shown to be relevant to the experience. Career considerations were suggested as important to SIEs by Vance (2002; 2005) who developed taxonomy of career path strategies which comprise phases of preparation for foreign employment. A foundation building phase involves exposure to international experience through tourism, study abroad, foreign language study and undergraduate or postgraduate study. Immersion is the stage, characterized by study in higher education, international internships, government foreign service or missionary type work. Foreign employment is then secured by either self-initiating or joining an MNC track. Thus, the career paths of SIEs may follow common trends and form an integral part of their mobility experience.

For example Richardson and Mallon, (2005) found that individuals believed that the experience would bring a distinct career advantage. However, this depended on both where the experience was gained and on the types of activities undertaken. Sample characteristics may be a determining factor in explaining the career experiences of SIEs. For example those studied by Inkson, Thomas and Barry (1996) were young people potentially at an early career stage, while Bozionelos (2009) studied qualified nurses; therefore career issues may be different across populations of SIEs at different life and or career stages.

The variations between populations located in different countries were borne out by studies of the career anchors of SIEs. Suutari and Taka (2004) found that the key career anchors among

Finnish SIEs were rooted in managerial competence and pure challenge. There was evidence for an internationalism anchor identified in strong work orientations grounded in the excitement of the opportunity to solve problems, overcome challenges and to work in the international context. In a later study of a French sample, Cerdin and Le Pargneux, (2010) found that the lifestyle anchor was most represented for both SIEs and assigned expatriates, while the internationalism anchor was more prevalent for assigned expatriates. In another study of SIEs in France (Crowley-Henry, 2007) both subjective career and the lifestyle anchor were found to be highly relevant to their career direction. They had been hired under local, host country contracts and had chosen to remain indefinitely in the host country, a decision also influenced by factors beyond the objective career. Crowley-Henry attributed this to a protean career outlook in which aspects outside work were fundamental in shaping their career behaviours. The relevance of career to SIEs was also highlighted by Tharenou (2003). She found that the expectation of career recognition was an important factor for young Australian graduates which appeared to increase receptivity to international careers. High outcome expectations (personal agency) combined with little family influence and no partner (few barriers) and employment in organizations with an international focus (opportunities) were key factors. This work suggests that an expectation of career recognition may be a precursor to the expatriation experience for younger SIEs.

Tams and Arthur (2007) acknowledged the importance of SIEs to international careers research but reiterated the concerns of Richardson and Zikic (2007) about the "risk and transience involved in pursuing an international career" (p 181). Due to the nature of contractual arrangements, for academic SIEs, there are potentially negative effects on networks, lack of

recognition and job stability. Tams and Arthur (2007) indicate the lack of research on whether and how SIEs can realize their motivational aspirations, what support they receive, what career constraints they face and how they cope with these in later career stages. Bonache, Brewster and Suutari (2007) also added that research is lacking about the extent to which traditional barriers to international mobility impact SIEs and what type of employment modes are followed. Therefore there is considerable scope to contribute to research on the experience and relevance of career for SIEs.

The recent work of Feldman and Ng (2007) establishes the importance of the concepts of career mobility, embeddedness and career success to the study of careers. They argue that career mobility has been used to refer to a wide range of changes including job, occupational and organizational changes which has compounded important differences such as motivation, ability and adjustment to career change. SIEs often engage in all of these changes in addition to geographical moves. The multifaceted nature of career and career change for SIEs is ripe for further investigation.

There is however a lack of theoretical grounding to consider the career experience of SIEs from a corporate perspective since as suggested by Banai and Harry (2005) the two groups of theories categorizing career development, (constructivist and objectivist; Savickas, 2000) have been developed to explore and explain domestic rather than international careers. The result is that career management is bounded by the organizational practices and processes which tend to be fixed rather than flexible and adaptable to variants in career such as that experienced by SIEs.

There is a need to build closer connections between the insights from the evidence base on SIEs and HRM theory and practice.

Future research on SIE

This review synthesizes published works acknowledging the range of studies and data available on SIEs. This paper argues for an extension of the knowledge base on a number of fronts to address areas requiring further theoretical and empirical investigation to significantly add to what we know about SIEs, their individual level characteristics, their role within organizations and their contribution in the global economy. Developing the evidence base about SIEs has remained problematic, in the first instance because of the lack of consensus in defining the construct, compounded by the fact that SIEs are not necessarily easily identifiable or accessible to academic research.

Initial research efforts relied heavily on in-depth interviews and case studies, often of individuals from specific geographical regions such as young New Zealanders (Inkson et al., 1997; Inkson and Myers, 2003), British academics (Richardson and McKenna, 2006) and repatriates to Ireland (Begley, Collings and Scullion, 2008). These provided rich insights into the individual experiences of SIEs. Many of the authors suggested the need to extend research to develop a more general picture of issues including motivation to go and the career development experienced, within larger samples. The methodological approaches used to access samples have included snowball samples (e.g. Myers and Inkson, 2003; Myers and Pringle, 2005) internet/on-line surveys (e.g. Biemann and Andersen, 2010; Doherty et al, 2011; Jackson et al., 2005; Jokinen et al., 2008; Thorn, 2009) or a combination of these (e.g. Al Ariss and and

Özbilgin, 2010) often drawing on convenience samples (e.g. Crowley-Henry, 2007). The use of these approaches re-iterates the difficulty in accessing samples of SIEs. There is an opportunity to go beyond the geographical limits of existing work. In extending the research base on SIEs it is important to ensure that enough detail about the individual and their experience are captured, including variables such as home and host locations, motivation to move, demographic details, the type of employment in home and host countries and career outcomes. Constructs and variables for future research are included at Table 2.

Some of the ambiguity in current findings is fed in part by the cross-sectional nature of the studies. Data from populations of SIEs have been captured at one point in time, resulting in an evidence base of snap-shots. Few studies, with the exception of Tharenou and Caulfield's (2010) recent work, have adopted a longitudinal approach. Tracking the SIE experience over time is challenging but longitudinal research designs are needed to capture the dynamic nature of mobility intentions, actions, transitions and outcomes over time to explore transitional states, from intention to action among SIEs. Further research is needed in order to gauge the magnitude of the population to provide evidence of the scale of SIEs as a potential global resource. In addition further research to establish the generalizability of the findings of the current body of studies is particularly important at this juncture.

Research questions which require further attention include a focus on micro level issues. Although a number of studies have explored the nature of individual motivations, the role of family and the relevance of life and career stage, further examination and replication of some of the established work are called for. Further research could explore issues such as intra and inter

home and host country comparisons impacting the intention to become SIEs, exploration of the factors which impact intended and actual repatriation behaviour and the many facets of employment such as job satisfaction, organizational identification and commitment. The thrust of the literature appears to suggest that the issues relevant to SIEs include context, location, family and specifics of the job and career aspects indicating a predominantly subjective orientation to the expatriation experience. Some indication that SIEs may have a more subjective career success orientation than corporate expatriates was highlighted in their career anchors (Crowley-Henry, 2007; Suutari and Taka, 2004), which suggested that SIEs display characteristics of the protean career. Further research could usefully be done to validate constructs such as career anchors of SIEs.

There is a need to address research questions relating to the utility of SIEs to corporations and meso-level issues about the employee-employer relationship. The indeterminate quality and the self-styled nature of SIE have hampered the consideration of this population as a potential corporate asset (e.g. Collings et al., 2007). In order to fully explore this issue further research could poll managers' perceptions of SIE to provide data on how SIEs are perceived within the organizational context. Many issues which were positioned as deterrents to employing SIEs are becoming the norms of career behaviour and characterized in the boundaryless and protean career types of contemporary career theory (Arthur and Rousseau, 1996; Hall, 1976, 1996). SIEs would potentially bring entrepreneurial skills, proactivity, flexibility, possibly alternative views of the world and a more encompassing, inclusive approach to work and non-work life.

These findings would suggest that the psychological contract of SIEs is potentially different to that of the corporate expatriate. Pluralism and the balance of the power dynamic may be central constructs to understanding the employment relationship (Cullinane and Dundon, 2006; Yan, Zhu and Hall, 2002) for SIEs. They take responsibility for their own expatriation experience and the career implications, clearly engaging in career self-management (King, 2004). Although SIEs are positioned as a global resource career appears to be a less salient motivator for them and it appears that their career experience is distinct. This suggests a more personalized career planning approach within organizations to account for different types of engagement, for example to accommodate differences between international and local hires and to address factors relating to life stages and changing priorities.

One potential avenue for future studies could consider subjective career experiences (Ng, Eby, Sorensen and Feldman, 2005). Ng et al. suggested that subjective career success is represented by career satisfaction rather than salary level or promotion. Given that SIEs appear intrinsically motivated it would be beneficial to examine their levels of subjective and objective career success. This avenue of research could usefully extend the knowledge base on what career issues and outcomes are important to SIEs, to include longer-term career implications. This would contribute to a better understanding of the subjective career drivers of SIEs and how these might be dealt with at an organizational level and add to the evidence base in the careers literature on objective and subjective career success (e.g. Heslin, 2005).

One HRM concern about SIEs is their propensity to move and their potential to be less committed to an organization (Mayrhofer et al., 2008). While the literature suggests that they

may be protean in their career orientation there is a need to more fully understand how this impacts their engagement with organizations. The concept of embeddedness considers the forces that keep people in their jobs, organizations and occupations. For the study of SIEs this construct could be extended to location embeddedness in the sense of what Richardson and McKenna (2006) termed allegiance to home and host countries. These factors appear fundamental to the journeys that SIEs make.

A key issue concerning the current publication base on SIEs is the need to connect the studies and the implications of the findings within a frame of reference that facilitates a more coherent approach to future research. This paper suggests adopting micro, meso and macro levels of research and analysis in order to facilitate the development of theoretical connections and organize the research stream (as outlined in Table 1.). Individual characteristics, motivational drivers and psychological resources have attracted attention at the micro/individual level of analysis. The evidence base would benefit from clarification of the samples used in these extant studies and further exploration of the links between individual level variables and the meso/organizational level. In particular there is a need to explore how individual level variables can relate to the organizational level further researching for example how the adjustment patterns among SIEs can connect to organizational performance. In addition it would be helpful to document the capabilities of SIEs and develop further theoretical and empirical links between the type of jobs that SIEs hold, their individual level career capital and the contribution they can make to organizational level human capital. A further step in theoretical development is required to demonstrate if and how the individual level career capital of SIEs can contribute to an organizational level competitive advantage. Such lines of enquiry need performance data and

measures of the utility of HR activities applied to SIEs. This could provide insights into practices for the management of SIEs. For example SIEs are intrinsically motivated to move abroad and to find employment. Their employment experience within the organization at the host location may mean they are under-utilizing their skills and therefore unable to both develop their own career capital and to fully contribute to the organizational or host country economy. Research to fully explore the relationships and processes for SIEs will contribute to an understanding of their experience. Such empirical work, in addition to helping to progress this area of study in an academic vein, would help to provide further rich data for use by practicing managers. Identifying, targeting and engaging SIEs as one pool of talent will require concerted efforts by managers to adopt appropriate strategies, policies and practices that embrace the diversity in such populations and to address the integration of their various talents.

Conclusion

This paper makes three noteworthy contributions. First through the review of published papers it synthesizes a diverse body of literature, illustrating the somewhat heterogeneous nature of the field at present but also highlighting the emergence and continuing exponential growth in the study of this topic. Second it draws attention to the pressing need for clarification of the construct of SIEs to define the population being studied. Establishing a clear definition of what constitutes and SIEs and differentiating SIEs from other mobile groups is essential to defining the field of study and clarifying a future research agenda. A novel aspect of this paper is that it reviews publications on SIEs paying attention to the level of analysis of these studies. The thematic analysis reflects trends in the evolution of research on relatively new topics of interest. For example, reviews of the expatriation literature highlight deficiencies in practice and

showcase the vying themes of selection, cross-cultural training and career concerns (e.g. Mendenhall, Dunbar and Oddou, 1987) while reviews of career related topics such as mentoring show a trend for evolution in the construct over time, with the growing literature base (e.g. Haggard, Dougherty, Turban and Wilbanks, 2011). Third, based on the critique of current published works this paper offers a framework which can help to guide the future research agenda. Adopting micro, meso and macro level perspectives (Rousseau and House, 1994) can help to bring coherence to the data base of studies, will facilitate linkages between the levels of analysis used to study SIEs and also frame potential areas for future research including descriptive and explanatory studies in this field.

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Table 1. Levels of analysis and constructs/variable in current and for future research on SIE(s)

Level of analysis	Constructs/Variables
MICRO Individual ↕	Individual characteristics, demography, family situation, life stage Motivational drivers Qualifications, work attitudes, type of position Job, organization, location embeddedness Job satisfaction, commitment, adjustment (general, contextual, work) Career orientation, career anchors, career success, Psychological contract, Career capital
MESO Organizational ↕	Organizational context - strategy, policy, practice, culture, resourcing, HR planning Performance measures Career management / development Organizational capital
MACRO Contextual	Home/host context, talent flow magnitude, talent pool potential Human capital

APPENDIX 1.
A chronology of published studies (1996-2011) focusing on the SIE experience

Author	Study focus	Method / Sample	Findings/contribution	Gaps identified
Selmer & Lauring, 2011 (b)		428 self-initiated expatriate academics from 60 countries employed in 35 universities in five northern European countries	MANCOVA / ANCOVA analysis suggested SIEs reasons to expatriate differ in terms of acquired personal characteristics.	Longitudinal study of samples other than academics to capture processes over time and inclusion of demographics other than marital status, nationality, previous expatriate experience and seniority
Al Ariss & Jawad, 2011	Relational explanation of capital mobilization of SIE and skilled migrants using Bourdieu's theory of capital	Skilled Lebanese moving from developing to industrialized contexts (France), 39 qualitative interviews accessed via snowballing, social contacts, cold calls and an internet address book	Individuals applied a combination of capitals to overcome barriers to their international mobility, including professional, educational, social and economic capital exploring experiences of an ethnic minority group	Qualitative and quantitative research to determine generalizability of findings to other groups of migrants Use of multilevel and interdisciplinary perspectives, exploration of institutional and organizational dynamics
Selmer & Lauring, 2011 (a)	Gender, marital status and self-reported work performance and work effectiveness among SIEs	Electronic questionnaire polling a convenience sample of 428 SIE academics in universities in Nordic countries and the Netherlands	Positive association between marital status and favourable work outcomes and work performance but no moderating effect of gender	Further focus on gendered issues in the experience of SIE and extend to business contexts

Doherty, Dickmann & Mills, 2011	Comparative study of the motivations of SIE and corporate expatriates	Web based survey of 522 expatriates	Factor analysis of motivational drivers rendered 8 factors across which SIEs and corporate expatriates differed significantly on location, career and host country reputation	Future coverage of wider samples to gauge links between host and country of origin, longitudinal research, fuller sample details to focus organizational engagement approaches
Stalker, 2011	Social constructionist / feminist exploration of SIE women's experiences of working in UAE	Qualitative study of 12 women accessed via snowballing technique based on chain referral	Individuals experienced being foreign and gendered in the social and organizational context. Lack of organizational support focussed behaviour on accessing informal sources of learning and social support	Further exploration of informal learning and social support for female SIEs, in particular the role of networking and support groups
Tharenou & Caulfield, 2010	Push/pull factors impacting repatriation intention among SIEs	Survey of 546 Australian professionals, over 2 time periods	Weak host country pull / strong home country pull and shocks motivate repatriation	Explore developing country home / host locations, dual country identification, measurement of the mediators of intention and satisfaction at different times, explore embeddedness, shock, gender, job turnover and management practices
Selmer & Lauring, 2010	Demographic characteristics of SIEs and motivations to expatriate	Web survey of 428 expatriate academics from 60	SIEs reasons to expatriate differ according to gender and age	Longitudinal research, extend to business contexts and across demographics

		countries, employed in five northern European countries		beyond age and gender
Tharenou, 2010	Theoretical exploration of gender issues in SIE		Lack of fair treatment and virtue among business leaders in the selection, assignment and promotion opportunities for women. Lack of virtue Women initiate their own expatriation more often than being assigned	
Schoepp & Forstenlechner 2010	SIEs, family and retention	Survey of 364 SIEs in education, in Arabian Gulf countries	Environmental factors ease adjustment	Explore different settings where family may be a motivation to remain
Howe-Walsh & Schyns, 2010	Theoretical review of HR implications of SIE adjustment		Based on adjustment theory identifies assumptions to help SIEs reach their performance potential	
Cerdin & Pargneux, 2010	Career anchors, French expatriates	303 SIE and assigned respondents, comparing Schein's career anchors.	Lifestyle anchor most represented for both, internationalism anchor significantly more represented for assigned expatriates, security anchor uncommon for both but more prevalent for SIEs	Validation of internationalism anchor with different samples
Biemann & Andersen, 2010	SIE vs company assigned expatriates, Germany	Online questionnaire from 159 expatriate managers	SIE start international career younger, have higher organizational mobility and expect higher benefits for	

			future careers, career orientation remains stable across age groups. Practical implications for HRM	
Al Ariss & Özbilgin, 2010	Lebanese SIEs in France	Interviews with 43 Lebanese skilled SIEs France, accessed via snowballing, social contacts, cold calls and internet	SIEs from developing countries experience structural barriers to career development leading to under-utilization of skills particularly due to ethnic and gender discrimination	Analysis of the relationship between institutional attitudes, organizational and contextual and individual perspectives in shaping career experiences
Al Ariss, 2010	Conceptual framework for analysis of international mobility based on theoretical frame of modes of engagement	Interviews with 43 Lebanese migrants, 6 interviews with policy makers	Four modes used to progress career; maintenance, transformation, entrepreneurship, opt-out	Application of the framework to study experiences of minority groups undertaking an international career, comparative studies needed
Forstenlechner, 2010	SIE's perceptions of justice in host country locations	Interviews with 33 SIEs	Perceptions of host country justice and support are similar to organizational justice	Further exploration of perceptions of justice at organizational and national levels
Bozionelos, 2009	Relationship between job satisfaction/ turnover intentions and cross-cultural training, protégé experience, peer support and culture of home/host and role of gender	206 non-Saudi expatriate nurses employed in Saudi hospitals	Involvement in relationships with mentors was related to job satisfaction mostly for expatriates who were of non-Arab-origin and reported low peer support. Cultural origin displayed the strongest relationship with turnover intentions.	Explore actual behaviour such as voluntary turnover; explore long-term outcomes of SIE including willingness to expatriate again following repatriation, perceived benefits and career impact. Explore other

				professions and national contexts
Peltokorpi & Froese, 2009	Adjustment of corporate and SIEs in Japan	Personal contacts, survey in Japan, comparing cross-cultural adjustment of SIE and organizational expatriates 179 respondents	SIEs better adjusted than organizational expatriates to general aspects of the host country and in interactions with host country nationals	Test adjustment in other countries, particularly non-Asian contexts, focus on antecedents to adjustment and work attitudes
Thorn, K, 2009	Motives for self-initiated mobility	Quantitative internet survey of 2,600 highly educated New Zealanders	Cultural, travel and career motives identified as the most important in the decision to be mobile. Priority of motives varies according to age, gender, location and life stage	
Peltokorpi, 2008	Cross cultural adjustment of expatriates	Paper and pencil survey 110 organizational expatriates (OE), SIEs in Japan Measures of non-work related adjustment, work related adjustment personality, and cultural distance	Cultural distance, expat language proficiency, type and personality traits impact both types of adjustment	
Jokinen, Brewster & Suutari, 2008	Career capital of expatriates contrasting SIE and company assigned	Internet survey of 222 Finnish economics graduates who expatriated	Similarities and differences in the development of career capital	Other country, intra-country comparisons with non-expats, end-state level of cc development and

				possible differences between AE / SE
Richardson, McBey & McKenna, 2008	Realistic recruitment for internationally mobile knowledge workers	Qualitative study of international faculty in 6 Canadian universities, 44 in-depth interviews	Suggests a more holistic approach to the recruitment of internationally mobile knowledge workers, particularly those moving independently; individual proactivity and employer effort	Extend to more diverse individuals and include international recruiters
Tharenou, 2008	Theoretical model of gender and family status influence on willingness to expatriate	Longitudinal survey 631 individuals with partners and/or children, 208 childless singles	Gendered nature of willingness to relocate abroad	
Begley, Collings & Scullion, 2008	Cross-cultural adjustment of self-initiated repatriates	18 self-initiated repatriates to the Republic of Ireland, focus groups, interviews	Adjustment to work presents significantly greater problems for self-initiated repatriates	Research on repatriation experiences of self-initiated- re-entry experience and HR practices
Crowley-Henry, 2007	Qualitative study of career-related motivations and experiences of 20 locally hired expatriates (Munich/France)	Importance of subjective career and life-style anchor to career direction of SIEs More holistic approach to career impacted by life-stage and circumstances	Co-existence of orthodox career patterns and variations Focus on locally hired IAs	Organizational perspectives on local hires; numbers and perceived value, trends particularly in the EU
McKenna & Richardson, 2007	Independent internationally mobile professional	Alternative forms of international workers are	Model of effective decisions for IA	More research needed on mobile professionals and how organizations

		under researched		can connect to them
Richardson & Zikic, 2007	Downsides to SIE	Qualitative, semi-structured interviews with 30 expatriate British academics to Singapore, UAE, New Zealand and Turkey	Transience and risk identified as the challenges of an international academic career	Extend to other nationalities, host countries and institutions, policy and practice for international faculty
Tams & Arthur, 2007	Conceptual development of careers in cross-cultural perspective	Review of literature on self-initiated international careers	Involuntary nature of some self-initiated moves	Limited body of literature, need for more on motives, experiences, career development and long-term outcomes of S-I
Hudson & Inkson, 2006	Personalities, values and previous experience of overseas development volunteer workers	Longitudinal study, structured interviews, NEO-PR personality inventory and Schein Career Orientation Inventory, and e-mail survey of 48 New Zealand volunteers	High levels of openness and Agreeableness, Career anchors of dedication to a cause and pure challenge	Long-term follow-up
Richardson, 2006	Theoretically grounded exploration of the family's role in the decision to expatriate independently	Interviews with 30 British faculty working in universities in Singapore, New Zealand, Turkey, and UAE	Family played a strong role including extended family	Larger studies needed for generalization, alternative family forms, families as allies
Richardson &	Self-directed	In-depth	Modifications to	Explore groups

McKenna, 2006	expatriate relationships with home and host country, model of expatriate allegiance	interviews with 30 British expatriate academics working in New Zealand, Singapore, Turkey and UAE	Black & Gregerson's model of expatriate allegiance	other than academics and implications for individual performance, longitudinally
Vance, 2005	Taxonomy of self-initiating career path strategies	Interviews with 48 American expatriates in East Asia	Taxonomy of pre-international self-initiating career path strategies	Further study of self-initiating strategies and activities actually used. MNC pre-international self-initiated strategies
Carr, Inkson & Thorn, 2005	Career forces motivating migration	Case study of New Zealand, data from a sample of New Zealand expatriates	Policy implications at national and organizational levels	Explore factors across groups and contexts
Fu, Schaffer & Harrison, 2005	Proactive socialization, adjustment and turnover of SIE	Expatriate adjustment-organizational & community fit, expatriate English teachers in Hong Kong longitudinal, 561 subjects	Positive framing enabled more effective coping,	
Jackson, Carr, Edwards, Thorn, Allfree, Hooks & Inkson, 2005	Psychometric measure of motives driving labour mobility	Inter-net survey via 32 professional associations in New Zealand. 26 item measures, PCA	5 components : Lifestyle; Whanau/Family; Career; Culture; Economics	Content validity of instrument, theories of career mobility, policy for employers, national and global agencies development of standardized instruments to measure global talent flow

Lee, 2005	Antecedents and consequences of under-employment among SIE	302 SIEs from 39 organizational settings in Singapore, measures of autonomy in job performance, job suitability, variety, perceived fulfilment of psychological contract, perceived under-employment, job satisfaction, alienation from work, career satisfaction	Lack of job autonomy, job suitability, job variety and fit to psychological contract contributed to under-employment which underpins negative work attitudes	Extend sample beyond males, individual differences, longitudinal
Myers & Pringle, 2005	Gender influences on self-initiated foreign experiences and contribution to international career development	Gendered analysis of semi-structured interview data from 50 free travellers, snowball sampling,	SFE provided accelerated development opportunities for both men & women, women sought less risky more secure environments for career capital development	Extend beyond snowball sample, educated, professionals
Richardson & Mallon, 2005	Role of individual agency and perceived value of international experience	British academics	Internationalization of academia, Practical recommendations	
Suutari & Taka, 2004	Exploration of career anchors among managers with global careers	Finnish	Managerial competence, pure challenge	Internationalism anchor
Inkson, Carr,	Motivations of	Questionnaire	Outflow	

Edwards, Hooks, Jackson, Thorn & Allfree, 2004	expatriates	on web-site, professional associations, 2201 respondents	economically driven,	
Inkson & Myers, 2003	Big OE	Snowball sample of OE returnees, 50 semi-structured in-depth interviews. Cases studies and typology of OE's	Sample young (<25 yrs), high socio-economic status Motivations cultural & social, OE as a social experience	Study other countries, larger samples, compare career development with non-travelling control groups and non-working tourists
Myers & Inkson, 2003	OE as a talent	Snowball sample of OE returnees, 50 semi-structured in-depth interviews	Desire for exploration, not explicitly career driven,	
Tharenou, 2003	Initial development of receptivity to working abroad, social cognitive career theory	Survey of 213 Australian business school graduates prior to full time work and follow up at 2 years	High personal agency, few barriers and working in organizations with an international focus fostered receptivity to international careers	
Napier & Taylor, 2002	Women professionals working outside their home country	Semi-structured interviews, female, independents (found their way abroad then pursue job opportunities), in Japan (70% of sample), China (265 of sample) & Turkey (32%	Analysis of reasons to go – economics of the country, national legislation e.g. visas,	Host county pull factors,

		or sample). Personal contacts, Chambers of Commerce, multi-national businesses, women's networks		
Sargent, 2002	Investigating differences between individually and organizationally initiated overseas experiences to Japan	Questionnaire survey of members of the American and Australian & New Zealand Chambers of Commerce in Japan 166 useable responses	Self-initiated were significantly more socio culturally adjusted, had desire to go to Japan and had local language OE younger, spent more time living in Japan,	
Vance, 2002	Individual perspectives on advancing international career and competency development	48 interviews with American expatriates in 5 major cities in East Asia	Model of development strategies and activities	Extend beyond males Pre-international experiences in other countries
Bhuian, Al-Shammari & Jefri, 2001	Influence of job satisfaction, job autonomy, job variety, task identity, feedback and employee demographics on organizational commitment	481 SIEs in Saudi Arabia , questionnaires distributed to employees measuring constructs	Job satisfaction significant predictor of org commitment	Job autonomy
Suutari & Brewster, 2000	International experience – self-initiated (SFE) vs company	Questionnaire survey of Finnish members of union of graduate engineers, 448	Significantly higher % of females, single, in SFE group, SFE significantly more driven by poor employment situation in home	Exploratory, one country, lack of strategic identification of SFEs as organizational resource,

		responses, 33% SFE, 67% employer backed	country SFE very heterogeneous population – sub-groups of SFE conceptually labelled	Significantly under researched group
Inkson, Arthur, Pringle & Barry, 1997	Comparing expatriate assignment vs overseas experience career models	Case study data	Advantages of OE for individual development	Shift in policy from planning towards knowledge
Inkson, Thomas & Barry, 1996	OE and competitiveness career effects of overseas sojourns	Qualitative study of career histories of 75 Quantitative, questionnaire study of 258 University of Auckland alumni	Typology of OE	