

*Two decades of research into SIEs and what do we know? A systematic review of the most influential literature and a proposed research agenda*

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# **Two decades of research into SIEs and what do we know? A systematic review of the most influential literature and a proposed research agenda**

## **ABSTRACT**

### **Purpose**

This paper aims: to undertake a systematic literature review on SIEs, examining twenty years of literature published between 2000 and 2020, focusing on the most-cited empirical work in the field; to analyse the topics covered by these studies; and to propose a research agenda.

### **Methodology**

We conducted a systematic literature review, identifying the 20 most-cited empirical articles through citation analysis during the period and, because citations accrue over time, the six most-cited empirical articles of the last three years. We then used content analysis to examine the main themes they address and identify the research gaps.

### **Findings**

The most common themes addressed in the SIE literature are: analysis of the types and distinctions of SIEs, motivation to undertake self-initiated expatriation, SIEs' adjustment to the new country, and SIEs' careers and outcomes.

### **Originality**

This paper provides a first opportunity to look back at 20 years of research into a relatively new topic, highlighting the main research themes and knowledge gaps, and setting directions for future research. The paper expands knowledge on SIEs, assisting SIE scholars and IHRM practitioners to develop a global, critical understanding of SIEs' issues, and hopefully energising future research in this field.

### **Key words**

Self-initiated expatriates; systematic literature review; construct clarity; SIE definition; SIE motives; SIE adjustment; SIE careers; SIE outcomes; future SIE research

## INTRODUCTION

Self-initiated expatriates (SIEs) have always existed. The ancient religious texts are full of stories of people visiting other countries for extended but temporary stays and a quick perusal of the history of state diplomacy or art or exploration will show that the process has continued ever since. The business and management literature on the topic began in the 1960s with studies of Peace Corps and other volunteers (Gordon, 1967; Henry, 1965; Mischel, 1965; Taylor, 1968). However, perhaps because of the difficulties in the pre-internet age of getting access to samples, attention quickly switched to research carried out through employers, so that researchers adopted the employers' definitions, and the word 'expatriate' came to signify only organisationally-assigned expatriates (AEs).

The first paper specifically about, and focused on, SIEs (we concentrate on the people rather than the process) was published in 2000 (Suutari and Brewster, 2000). In the following decade (2000-2009), some 15 articles or book chapters addressed the topic directly; there were 80 such texts in the next five years (2010-2014); and in the five years after that (2015-2019) almost 100 of them, with 31 in 2019 alone. Two edited books specifically about the topic were published in Europe in 2013 (Andresen, Al Ariss and Walther, 2013; Vaiman and Haslberger, 2013) and later one more in Europe (Andresen, Brewster and Suutari, 2020) and one in Japan (Furusawa, 2020)<sup>1</sup>. The topic has become a staple of International Human Resource Management (IHRM) textbooks and courses.

This paper offers several important contributions. First, we expand knowledge of SIEs by offering a systematic literature review (SLR) of the most influential empirical papers on SIEs, highlighting their main features, themes, findings, by identifying what we know, and what we don't know yet about SIEs and, by highlighting knowledge gaps that should be addressed, suggesting future research directions on SIEs. Second, our paper contributes to the development of SLRs in IHRM. Third, this paper can help SIE scholars and IHRM practitioners to develop a global, critical understanding of SIEs' issues. Fourth, our research agenda can help SIE scholars to develop research projects on questions that are really new, which will, we hope, energise future research in this field.

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<sup>1</sup> These numbers cover just the articles and book chapters that we have been able to identify that had the words 'self-initiated expatriates' or something similar in their titles. The journals included are not all business and management journals; book chapters are only counted if the book itself has not already been counted. Conference proceedings, theses and working papers are not included and would increase the numbers substantially if they were.

Critical literature reviews are an essential feature of academic research, to understand the breadth and depth of the existing body of work and identify gaps to explore: “[r]eviews with the purpose of extending the existing body of work can be selective and purposeful” (Xia and Watson, 2019: p. 105). A systematic review of the literature on SIEs, where many research studies address similar questions, would help clarify the state of existing research, develop a comprehensive view of the main themes, identify key limitations, and suggest a research agenda to focus future studies on important knowledge gaps.

The objectives of this paper therefore are: 1) to conduct a systematic literature review (SLR) on SIEs, focusing on the most-cited empirical studies published in peer-reviewed journals between 2000 and 2020; 2) to critically analyse their content; and 3) to propose a research agenda.

The article takes the following form. First, we explain the relevance of conducting a SLR on SIEs and clarify the concept of SIEs, because without clear constructs this research, like any other, is weakened to the point where it begins to add very little to our understanding.

Second, we explain our methodology. We present the steps we followed to conduct our critical SLR and analysis of the most-cited empirical studies on SIEs. Third, in the findings section, we examine that literature under four headings, identifying the four most common topics of research in these studies: analysis of the types and distinctions of SIEs, motivation to undertake self-initiated expatriation, SIEs’ adjustment to the new country, and SIEs’ careers and outcomes. Lastly, in the conclusion, we consider what is still not known about SIEs and propose an agenda for future research. Based on the analysis of the research methodologies employed in the selected studies of SIEs, we also highlight the need for better research methodologies in future studies of SIEs.

## **SYSTEMATIC LITERATURE REVIEW USING THE ‘SELF-INITIATED EXPATRIATE’ CONSTRUCT**

### **The Relevance of a Systematic Literature Review of SIE Studies**

Although SLRs are prevalent in the field of medical science and are increasingly used in social sciences (Petticrew and Roberts, 2008), they are still uncommon in the field of

management, where most papers are based on narrative literature reviews (Boiral Guillaumie *et al.*, 2018), and this is very much the case for the literature on SIEs.

A SLR of SIE research is needed for the following complementary reasons. First, the main findings of the increasing number of academic studies of SIEs have not, to date, been analysed systematically, although there have been earlier reviews of the subject (for recent ones see, e.g., Selmer, Andresen and Cerdin, 2017; Suutari, Brewster & Dickmann, 2018). Published studies of SIEs are segmented and diverse in terms of types of articles (conceptual or empirical), types of SIEs studied, countries of origin, countries of location, types of employer, sector of activity, organisational size, topics examined, levels of analysis, and research methods adopted. Our SLR of the subject provides a comprehensive summary, overview and synthesis of the most-cited of these studies; and will be valuable for scholars and managers with limited time to read the full scope of research in this field.

Second, a SLR allows us to assess the strengths and weaknesses of existing knowledge on self-initiated expatriation (Bonache, Brewster, Suutari and Cerdin, 2018). The boom in studies of SIEs in the last two decades only leads to a better understanding of the subject if we can trust the results: in other words, if the research is of good quality. We therefore also assess the quality of the evidence that we have. A SLR provides an overview of the literature on self-initiated expatriation, its main characteristics, findings and trends and clarifies the limits of the existing literature. Our SLR allows us to identify deficiencies, to show what topics have been covered by these studies and which still need to be addressed.

Third, our SLR uses citation numbers to help us identify the most relevant papers. Amongst the large number of publications on SIEs, our criterion for identifying the most relevant papers is to count the papers that have been used the most times in other people's research. We could have used journal rankings but the link between journal rankings and quality is unclear: almost a quarter of 'top' journal articles never get cited at all "even by their own authors" (Mingers and Burrell, 2006: 1455). We wanted to capture the most influential papers and the simplest measure of influence is the number of citations. We appreciate that there are limitations to this approach (for example, a critique of a paper counts as a citation) but this seems the most objective criterion for defining inclusion and exclusion.

Lastly, a comprehensive review enables us to identify potential future research directions: not just where we go next but, critically, why. Specifically, it shows tendencies generally ignored

in the literature, revealing research gaps and future avenues of research. A SLR helps to refocus future studies on research questions that are really needed.

### **Clarifying the SIE Construct**

To carry out such a review, we need, as in all social science studies, to be sure that our constructs are clear (Molloy and Ployhart, 2012; Suddaby, 2010). Unless we are very clear about what we are researching and, concomitantly, what we are not researching, then any outcomes of our research have limited value: we cannot compare our results with others, we cannot be sure how far we can generalise from our results, and we cannot, in short, be sure of their meaning or their value. Unfortunately, human resource management (HRM) in general, and IHRM specifically, have often suffered from a lack of construct clarity. So, what and who are SIEs? Manifestly, they are a sub-set of expatriates. The ‘expatriate’ construct has been clearly defined: using prototype theory to identify boundary conditions, McNulty and Brewster (2017) outline the requirements as someone living and working legally for a temporary period in a country that is not their own. SIEs are people who meet those criteria and who made the decision to work in another country themselves: they either go to that country and get a job once there, or they apply for employment there from their home country and some are then supported to move; or, if they were already working abroad when they made that decision, they are SIEs if they elect to work for a different organisation (Suutari and Brewster, 2000).

As with other categories of internationally mobile worker (see McNulty and Brewster, 2019), the concept of SIEs has been subject to the ‘jangle fallacy’ (Molloy and Ployhart, 2012): the notion that adding slightly different terminology will help to clarify the topic. Thus, SIEs have also been called *self-selecting expatriates* (Richardson and McKenna, 2002), *self-directed expatriates* (Richardson, 2006), *self-initiated foreign workers* (Harrison *et al.*, 2004), *independent internationally mobile professionals* (Tharenou, 2013), *self-initiated movers* (Thorn, 2009), and *self-made expatriates* (Tharenou and Caulfield, 2010). These options come with the associated ‘alphabet soup’ of acronyms, further exacerbated by authors who use the self-initiated category but, presumably in opposition to the notion of AEs, refer to them as SEs (Alshahrani and Morley, 2015; Biemann and Andresen, 2010). Here, whatever terminology the various authors have used, we will use the terms ‘self-initiated expatriates’ and ‘SIEs’ to refer to this particular group of internationally mobile worker.

It has been argued that the SIE category requires criteria beyond the established construct. Cerdin and Selmer (2014) suggest an educational requirement: SIEs must be skilled or have professional qualifications. Leaving aside the difference between skills and qualifications, and the additional complication of their examples of hairdressers and bakers, it is difficult to see why we should restrict a category based on prior assumptions about 'managerial' skillsets. We prefer the simplicity of logical analysis based on international transfer, legal work, and (as we discuss below) intent that the stay is temporary. Peltokorpi and Froese (2012) and Tharenou (2013) also want to restrict the SIE term to 'professionals' and it is clear in the texts of many other scholars that, although they have not declared that limitation, in practice it is an assumption they have made. This restriction is presumably an attempt to mirror the profile of AEs: while there is some logic in assuming that, given the costs of deploying expatriates, multinational enterprises (MNEs) will only assign valuable high-status managers or technical specialists, there does not seem to be any reason why the SIE category should be restricted in the same way. Indeed, unlike AEs, samples of SIEs are more often found in non-managerial roles and professions (Andresen, Bieman & Pattie, 2015; Froese & Peltokorpi, 2013; Jokinen et al., 2008; Suutari & Brewster, 2000).

We also reject attempts to define the category in other ways where it has been suggested that SIEs can be people moving to a subsidiary within the same organisation (Andresen, Bergdolt and Margenfeld, 2013) or are people who come from developed countries in order to advance their careers (Al Ariss, 2013). These just seem illogical. Others have wanted to restrict the definition of SIEs to those who do not benefit from organisational support or sponsorship (Al Ariss and Özbilgin, 2010; Doherty *et al.*, 2011) and so cannot be prepared by their employer prior to their expatriation (Howe-Walsh and Schyns, 2010); those who are hired on local contracts (Andresen and Biemann, 2013); or to people who know the importance of their international acumen and experience (Crowley-Henry, 2007). In each of these cases there are exceptions that show these restrictions cannot be part of any sensible definition of the term SIEs: thus, many SIEs apply for jobs as academics, medical staff or employees of the United Nations or the European Union - once they have been offered such posts they may be sponsored or supported by their new employer and their new organisation may help them make the transition. There are some SIEs that are deliberately selected by organisations because they can communicate with and understand both local people and AEs or headquarters and have enhanced local salaries (Furusawa and Brewster, 2018). And, clearly,



expatriates may or may not be properly aware of their own international value, but they are still expatriates.

Accepting the category of SIEs arguably increases the definitional problems in IHRM. In the business and management literature, by far the most studied group of people is AEs, the people sent to another country to work by an organisation that already employed them or that recruited them specifically for that role. The distinction between AEs and other types of internationally mobile worker is clear (McNulty and Brewster, 2017): the mass of internationally mobile workers including migrants and others, like SIEs, have taken their own decision to move to another country rather than being asked to go by their employer. As with SIEs, there will be sub-categories within the migrant group and some of them have been confused with SIEs (see Al Ariss, 2010, 2013; Muir *et al.*, 2014; Vance and McNulty, 2014).

## METHODOLOGY

In order to get a better understanding of the research into SIEs, we conducted a SLR and content analysis of the most influential studies in the field. There are different kinds of literature reviews. A narrative literature review, which is by far the most common in our field, is a discussion informed by self-selected literature known to the author(s). SLRs by contrast, are defined as “attempts to minimize bias using systematic and explicit methods to identify, select, critically appraise and summarize relevant research” (Needleman, 2002, p. 6). A SLR is “a specific methodology that locates existing studies, selects and evaluates contributions, analyses and synthesizes data, and reports the evidence in such a way that allows reasonably clear conclusions to be reached about what is and is not known” (Denyer and Tranfield, 2009, 671). Compared to the narrative approach, the SLR presents several advantages: it is based on replicable methods, and minimizes bias related to the identification, selection and analysis of studies (Needleman, 2002). A SLR also ensures that obtained results can be reproduced and improves the quality of the review process (Crossan and Apaydin, 2010).

A SLR also has drawbacks. Because of the specific selection criteria (citations), some potentially interesting papers have been ignored. Even if this type of purposive and selective sampling logic is accepted and even advised in the SLR approach (Xia and Watson, 2019), this means our content analysis is restricted to the selected set of studies. Further, as SLRs

focus on recurring themes, they mostly reflect the findings of extant mainstream literature (Boiral *et al.*, 2017).

SLRs are based on three steps (Oliver *et al.*, 2005; Tranfield *et al.*, 2003): 1. Setting the review protocol; 2. Searching for relevant studies using inclusion and exclusion criteria; and, 3. Data extraction and analysis.

### **Setting the Review Protocol**

Our research was limited to *empirical* studies published in journals with a peer review system. Our SLR covers two decades: 2000-2009 and 2010-2019. The year 2000 was chosen because it is the year of publication of the first article to identify the SIE phenomenon - Suutari and Brewster (2000). As noted above, previous studies had addressed people who would later be seen as fitting into the SIE category - for example, Inkson *et al.* (1997) had drawn a distinction between AEs and gap-year 'overseas experiences' - but the Suutari and Brewster (2000) study was the first to specifically identify expatriates who had made their own way abroad rather than being sent by their organisation. As our analysis was conducted in June 2020, we chose 2019 as the last year in our search. Given the dramatic changes caused to international mobility by the COVID-19 pandemic, making before and after data to some extent non-comparable, that proved to be a felicitous decision.

We only included articles written in English, because of the dominance of this language in the SIE literature. Finally, we only included articles that have been the most-cited empirical studies in the field. Different listings show different numbers of citations: the Google scholar list, for example, operationalised by web-crawlers, includes all citations, even replications and those in non-academic texts. Since we wanted to limit our search to scholarly citations, we used a combination of Web of Science (WOS) and SCOPUS lists, both of which rely on expert editors (<https://blogs.lse.ac.uk/impactofsocialsciences/2019/12/03/google-scholar-web-of-science-and-scopus-which-is-best-for-me/>). In practice, checking the most-cited articles, the lists remain broadly the same whichever citing system is used. For reasons of parsimony and space we capped the list at the 'Top Twenty' most-cited articles.

Since the number of citations to any one article builds up over time, and since we wanted to acknowledge more recent articles that may become influential, we conducted a secondary review of articles published in the last three years (since 2017) to identify the five most-cited articles. As there was a three-way tie for fourth place at the time of our analysis, we ended up with six articles in the last three years, which we subsequently refer to as the 'Top Six'.

## Searching for Relevant Studies

We searched the SCOPUS and WOS databases, in June 2020, using the following key words: ('self-initiated' or 'self initiated') AND (expatriate OR expatriates OR expatriation OR assignment) in the topic, title, and abstract.

We adopted two steps to screen the material: boundary criteria and methodological screening. As a first step, boundary criteria screening ensures that the articles selected fit the objectives of the SLR: in our case, articles providing data on self-initiated expatriation. We applied the above-noted criteria for inclusion and exclusion of papers through the analysis of the title, abstract, keywords and the publication features of the papers (language, year of publication, source). As a second step, methodological screening ensures the quality and rigour of the articles including the levels of sample selection, data collection and analysis (Fink, 2013). We eliminated conceptual and editorial papers and promoted the next paper in the list so that finally we arrived at a list of empirical papers. In the SCOPUS database, the use of the specified key words, after the boundary screening, resulted in 159 empirical articles after we eliminated conceptual articles and editorials. In the WOS database, the use of the specified key words, after the boundary screening, resulted in 182 empirical articles after we eliminated conceptual articles and editorials. It will be seen from Table 1 that by the time we reached the 20<sup>th</sup> article the number of citations was quite low, with only a handful of citations. We therefore selected the Top Twenty as being an appropriate list to work from. We compared the Top Twenty most-cited articles from the two lists: rankings were almost the same (the top five were identical, and in the top twenty most only moved their ranking by one or two places depending on which list was chosen). We decided to use the Scopus rankings (see Table 1).

For more recent papers published during or after 2017 until 2019, we carried out exactly the same procedure, although this time the number of citations was, of course, lower (see Table 2). The Scopus and WOS lists give the same six papers in the same order, although in SCOPUS the bottom three had the same number of citations. Since these papers had only had three years to build up citations, and since citations tend to lead to further citations, we identify the 'Top Six' most-cited articles, assuming that they will become influential in the future. Figure 1 describes the selection process for the reviewed articles.

<<Figure 1: Selection process for the Top Twenty-Six most-cited empirical articles on SIEs (2000-2019) about here>>

<< Table 1: 'Top Twenty' most-cited empirical articles on SIEs (2000-2019) about here>>

<<Table 2: 'Top Six' most-cited empirical articles on SIEs in the last three years (2017-2019) about here>>

### Data Extraction and Analysis

As a third step in the SLR, we extracted and analysed relevant data from the selected papers. We did this using the content analysis method, defined as “a research technique for making replicable and valid inferences from texts (or other meaningful matter) to the context of their use” (Krippendorff, 2012, p. 403). Content analysis is based on the interpretation of data in relation to a systematic codification process to consolidate information around themes or recurring concepts (Schilling, 2006). The information coding allowed us to synthesise systematically essential data from various articles and quantify certain trends (Elo and Kyngäs, 2008).

Data extraction and analysis followed three steps (Boiral et al., 2018): (i) development of a categorisation grid; (ii) extraction of information according to the grid; and (iii) interpretation of results.

First, a categorisation grid was developed by the research team using guidelines suggested by Tranfield *et al.* (2003) and was based on two items: the characteristics of the studies; and their empirical results in relation to the objective of the SLR (in our case, SIEs). The characteristics of the studies we examined were: precise research topic, research design (qualitative/ quantitative; comparison with AEs or not), sample (types of SIE; number of respondents; home/ host countries of SIEs), sampling, data collection, data analysis methods, and journal of publication (see Table 3).

As a second step, and according to the grid, relevant information from the Top Twenty empirical articles (2000-2019), plus the Top Six empirical articles (2017-2019), was then extracted. In the third and final step, we analysed (and discuss below) our interpretation of the findings according to four themes: analysis of the types and distinctions of SIEs,

motivation to undertake self-initiated expatriation, SIEs' adjustment to the new country, and SIEs' careers and outcomes.

We conclude this paper with a research agenda for future studies.

## FINDINGS

### **Mapping of the Most-cited Empirical Articles on SIEs (2000-2019)**

Our description and analysis of the most salient characteristics of the 'Top Twenty' (2000-2019) and 'Top Six' (2017-2019) most-cited articles on SIE are summarized in Table 3. Here, we provide a brief summary.

**Journals:** Nine of the 26 most-cited articles have been published in the *International Journal of Human Resource Management*, by far the most common publication, followed by the *Journal of World Business* (3 articles). The rest of the articles are dispersed among 12 different journals.

**Sample and sampling methods:** There is a strong focus on Western home countries (that SIEs have originated from or repatriated to; 10 articles) and host countries that they are, or have been, working in (7 articles), with only a few articles including Asian respondents (6), or Asia/ Middle East destinations (8); none include Africa or Latin America destinations. The composition of studies on SIEs shows important gaps in terms of geographic distribution, and types of respondents. Oddly, for this group of expatriates there is a focus on male SIEs (70% of the respondents). There are 16 articles that use non-random (precise) sampling strategies (e.g., convenience, purposive; or snowball sampling; Collis and Hussey, 2013) including eight that have used internet trawls and snowballing strategies.

**Research design, Data analysis methods:** The overwhelming majority of studies (24 out of 26 articles) have adopted a quantitative research approach, with only two qualitative studies, including two longitudinal approaches.

<<Table 3. Mapping of the most-cited empirical articles on SIEs (2000-2019), N=26  
about here>>>

We identified four themes arising from the main points of the of the 26 most-cited articles, which we explore below: some articles, of course, covered more than one topic, as we identify below, and in Tables 1 and 2.

### **Theme 1: Analysis of the Types and Distinctions of SIEs**

Few of the 26 articles address the different types of SIEs by categorising them in the study; rather, most studies focus explicitly on one type of SIE.

Suutari and Brewster (2000) sub-divided the SIE group, noting that they fell into different sub-groups or categories: young opportunists, job seekers, officials, localized professionals, international professionals, and members of dual-career families. Some of these SIEs felt pressured to seek work abroad because (for example) they were experiencing poor job opportunities at home, while others were excited by the opportunity to learn about another country by living there; some had work agreed before they moved to another country, while others moved first and then looked for work. One category is, for example, officials: employees of the United Nations, the European Union or other such intergovernmental organisations, who apply for their post whilst at home, are selected after a fiercely competitive process (with often thousands of people from around the world also applying for the same job) and then appointed to relatively well-paid jobs, with extensive HRM support, before they move to the offices of the organisation in a sophisticated capital city and settle down to live and work for the duration of their appointment. Officials are in a very different situation from young opportunists who have gone to another country to experience and enjoy a new location and who then look for work after arriving. They, in turn, are in a different situation again to an AE who falls in love with a country (or with one of its inhabitants) and decides to leave their organisation and stay on there in another role with a new employer. Examples of SIE sub-groups thus include the CEO of a major multinational, the web specialist in a new gaming start-up, and the cleaner/ nanny in a wealthy person's home; but, critically, they are different kinds of SIEs and in different situations. In all areas of study - motivation to expatriate, adjustment to the host country, careers and long-term results - the implications of these different categories are likely to result in very different findings.

Amongst the most-cited studies, subsequent research (five studies) has tended to either deal with SIEs as a homogeneous group or to explicitly select out particular categories of SIEs. The homogeneous group of studies are probably mostly written up that way because the sample sizes are too small to enable any detailed work within sub-groups, although some (e.g., Shaffer *et al.*, 2016) deliberately conflate a number of different samples in pursuit of specific findings about elements of expatriation. The Shaffer *et al.* (2016) study also shares with several other of the most-cited articles an exploration of the differences and similarities

between SIEs and AEs. Amongst the specific sub-groups, we found two studies of health-care professionals (Bozionelos, 2009); and, for reasons that are not clear to us, there seems to be a fascination with academic SIEs (Selmer and Lauring, 2010, 2011, 2012; Froese, 2012). Analytically, academics are an interesting sample: they share with officials that the majority of them will have applied for their jobs from home, although there are some who were appointed once they were in the country – many of them as trailing partners.

## **Theme 2: Motivation to Undertake Self-initiated Expatriation**

Six articles focus on SIEs' motivations to move and work abroad, including four studies that focus on academics (with, among these, three articles using the same sample - Selmer and Lauring, 2010, 2011, 2012). One article focuses on comparing the motivations of SIEs and AEs (Doherty *et al.*, 2011). Most of the respondents were Western, male SIEs.

Thorn (2009), in an encompassing and multi-dimensional perspective, and using a quantitative approach, examined the motives for self-initiated mobility in a large population of qualified New Zealanders living and working around the world. She found that the most important motives for doing so were: 1) opportunities for travel and adventure; 2) career development; 3) economics (the financial costs and benefits of living and working abroad); 4) personal relationships (partner, family or friends); 5) quality of life (factors that improve the way you are able to live); and 6) the political environment (factors relating to the politics of the home or host country). She also found that motives vary depending on age, gender and life-stage.

These results have been confirmed for other Western populations and refined between SIEs and AEs. Doherty *et al.* (2011) studied motivations to undertake expatriation and the similarities and differences between Western SIEs and AEs in Europe. They identified eight factors/ dimensions of motivations: 1) location (perceptions of the host country location and the individual's perceived ability to adapt); 2) career (job and career prospects); 3) the desire for a foreign experience (adventure, challenge, opportunities to travel and work abroad); 4) host country reputation; 5) benefits to the family of working abroad; 6) home–host relations and the opportunities for networking; 7) personal relationships (comprising familial, social and partner ties); and 8) push factors (incentives to leave the home country). In comparing motives between SIEs and AEs, the authors found that location and host reputation motives were more important for SIEs, and that specific career motives, including job, skills and career impact, were more important for AEs.

Similar results have been confirmed specifically for academics. Froese (2012) focused on Western academics in South Korea. The respondents' main motives for moving to Korea were a desire for international experience, attractive job conditions, family ties, and poor labour market conditions in their home countries. Selmer and Luring (2010, 2011, 2012) studied international academics in Nordic universities. They also found that age and gender impacted on motives; younger SIEs were extrinsically motivated by money and career opportunities and less risk averse; and men were strongly motivated by money and opportunities to change their life (Selmer and Luring, 2010). Impacting on the main motives to expatriate (adventure/travel, career, family, financial incentives, and life change/escape) were marital status, nationality, previous expatriate experience, and seniority. Unsurprisingly, married academics had a higher mean score for family than their unmarried counterparts, and a lower score on life change/ escape (Selmer and Luring, 2011).

Some SIEs, perceiving expatriation as a way to escape from a situation, relationships or experiences in their previous life have somewhat confusingly been labelled 'refugee SIEs' (Selmer and Luring, 2012): their motivations could be argued to be as much about what is being escaped from as what is being offered in the new location (Richardson and McKenna, 2000). Unsurprisingly, a negative association has been found between 'refugee reasons' and work performance, work effectiveness, and job satisfaction (Selmer and Luring, 2012).

### **Theme 3: SIEs Adjustment to the New Country**

Expatriate adjustment has been one of the most studied aspects of IHRM more broadly (Lazarova and Thomas, 2012): seven (out of 26) of the most-cited SIE papers also covered the topic.

Peltokorpi (2008) quantitatively studied the antecedents of adjustment of 179 Western, mostly male, SIEs and AEs in Japan. Using hierarchical regression analyses, he found that AEs and SIEs were impacted differently but that the key positive determinants of adjustment were language proficiency and emotional and cultural empathy, while cultural distance had a negative effect. Supervisor nationality and emotional stability were related to job satisfaction. Peltokorpi and Froese (2009), using the same sample, found that SIEs reported higher levels of non-work adjustment but that there were no differences between AEs and SIEs on work adjustment. Froese and Peltokorpi (2013) refined these results, with 57 Western AEs and 124 Western SIEs in Tokyo, and found several differences in individual- and job-related factors, cross-cultural adjustment and job satisfaction between AEs and SIEs. SIEs had spent more



time in Japan than AEs and tended to be more proficient in Japanese. They were more likely to work for local companies, and under Japanese supervisors, and less likely to occupy managerial positions. In the study, adjustment was only significantly different between SIEs and AEs in respect of their relationships with locals.

Two other studies have assessed the adjustment of academic SIEs. Froese (2012) undertook a qualitative study of the motivations and adjustment of 30 Western SIE academics in South Korea, highlighting links between three motivational factors and adjustment (family reasons to expatriate, regional interest and poor labour market conditions at home). Examining the adjustment of SIE academics in the United Arab Emirates, Isakovic and Whitman (2013) identified significant positive correlations between adjustment and previous overseas work experience and culture novelty. However, they found that in that country, where most of the population was foreign, local language ability was not correlated with adjustment. There was instead a significant impact on adjustment related to satisfaction with previous overseas work experience, length of employment, gender, and location by city.

Cao *et al.* (2013) surveyed SIEs in Germany and found that positive adjustment mediated the positive relationship between having a protean career attitude and expatriation outcomes related to career satisfaction, life satisfaction and intention to stay in the host country.

Shaffer *et al.* (2016) adopted a different approach, drawing on role theory, and conceptualized, developed and tested a multidimensional scale of the work- and family-role adjustment of 'global professionals'. The authors assessed their scale through five related studies using data from 1,231 AEs and SIEs, international business travelers, and global domestics. They confirmed the scale's dimensionality, and provided evidence for convergent, discriminant, nomological and predictive validity. The authors demonstrated differences in levels of adjustment and in relationships between work and family demands and resources, showing that SIEs had higher levels of family adjustment than AEs.

#### **Theme 4: SIEs' Careers and Outcomes**

Altogether, 11 articles discuss the topic of SIEs' careers and outcomes, including five of the six most-cited articles from 2017-2019. The 11 articles do so from quite diverse angles: career aspirations and orientations (Biemann & Andresen 2010), underemployment perceptions (Lee 2005), career capital development (Jokinen, Brewster & Suutari 2008), turnover and job satisfaction (Bozionelos 2009), future career interests (Suutari & Brewster

2000), career anchors (Cerdin & Le Pargneux 2010) and boundaryless mindset and protean career attitude (Andresen *et al.*, 2015).

Biemann and Andresen (2010) compared the career aspirations and orientations of SIEs and AEs in management and executive positions and reported several significant differences between the groups. SIEs tend to start their international career earlier than AEs, have greater organisational mobility than AEs, and expected that to continue into the future. There was no significant difference in career orientation between the groups; however, career orientation tended to remain stable in SIEs over different age groups but declined for AEs with increasing age. Interestingly, while SIEs expected higher career benefits in terms of promotion than AEs, there was no difference in objective or subjective career success between SIEs and AEs.

Lee (2005) analysed the antecedents and consequences of underemployment among SIEs in Singapore (i.e., perceptions that they are working in less demanding/ lower quality jobs than they feel capable of). The study provides evidence that a lack of autonomy, job suitability, job variety and psychological contract fit leads to perceptions of underemployment, and that perceived underemployment is related to lower job satisfaction, work alienation and lower satisfaction with one's career.

Jokinen, Brewster and Suutari (2008) compared the development of career capital between AEs and SIEs. Their key observations, which applies equally to both AEs and SIEs, are that international work develops extensive knowing-why, knowing-how and knowing-whom career capital more broadly amongst all expatriates, and that both AEs and SIEs are able to develop their career capital substantially during their foreign stay. Only a few differences emerged: organizational knowledge developed more strongly among AEs than SIEs, and AEs developed more knowing-whom career capital than SIEs. These minor differences may reflect the fact that, on average, AEs work at higher organizational levels than SIEs and thus have broader exposure to management issues in an organization. Given their role as AEs, they also often have responsibilities across multiple national borders.

Bozionelos (2009) examined the antecedents of job satisfaction and turnover intentions among SIE nurses in Saudi Arabia, finding further evidence of the importance of social support abroad. The number of mentors who are committed to supporting SIEs was the most important factor for job satisfaction and turnover intentions. Similarly, peer support was found to increase the level of job satisfaction. The study also reported few significant

interaction effects though it emerged that involvement in relationships with mentors was related to job satisfaction mostly for SIEs who were of non-Arabic origin and who also experienced less support from peers.

Suutari & Brewster (2000) found that, in comparison to AEs, SIEs had more interest in accepting further international work and were prepared to stay abroad for longer periods. This may be partly a reflection of repatriation trends among AEs, where AEs are typically contracted or perceive they are obligated to return to the home country headquarters, whereas SIEs (who less frequently work in international companies than AEs) are less likely to feel that international experience is valued back in their home country and /or at headquarters and therefore do not feel pressured or obligated to return there. At a general level, there was no difference between either group as to their perception that international experience would positively influence their future career: all felt that it would.

Cerdin and Le Pargneux (2010) compared the career anchors of AEs and SIEs among French expatriates. Their findings indicate that the three dominant career anchors for both AEs and SIEs are the same: lifestyle, internationalism, and pure challenge. Differences included that internationalism and managerial competence anchors were more dominant for AEs while security, dedication to cause and life-style anchors were more dominant for SIEs.

Andresen, Biemann and Pattie (2015) found no difference between AEs and SIEs in their boundaryless mindset and protean career attitudes, although the construct validity of these two notions has been criticized (Inkson, Gunz, Ganesh and Roper, 2012; Rodrigues and Guest, 2010). Like Biemann & Andresen (2010), the authors found there were greater differences in mobility preferences among SIEs than for AEs. For example, it was more common for women to initiate the move abroad than it was for men and SIEs were, again, reported to work in lower positions of authority than AEs.

Five of the six most-cited articles from 2017-2019 examine SIEs' careers, a reflection of the intense interest in expatriate careers more widely. Dickmann, Suutari, Brewster, Mäkelä, Tanskanen & Tornikoski (2018) provide evidence from Finnish AEs and SIEs that both groups develop their career capital considerably during their foreign experience. Using the same sample, Suutari, Brewster, Dickmann, Mäkelä and Tornikoski (2018) analysed the long-term career impacts of expatriation on career capital development and found that AEs and SIEs both experienced career success – objectively through promotions, and subjectively through perceived employability and career satisfaction. The only identified differences were

how each group secured their next job: AEs are better able to exploit internal networks by securing job offers from their home country and in most, though not all cases, from their current employer, while SIEs have to work harder to secure job offers with a new employer and often in a new country through external networking. Notably, because of both home organization networking and, in some cases, contracts, it was more common for AEs to repatriate to Finland than it was for SIEs (Suutari & Brewster, 2000).

Hussain and Deery (2018) report findings on the reasons behind turnover intentions among SIEs in the United Arab Emirates. They identified that on-the-job embeddedness decreased turnover intentions for SIEs. On the other hand, shocks faced by SIEs, which are defined as events that lead employees to reassess their job, and presumably their knowing-why career capital, impacted on turnover intentions positively. Some interaction effects were identified: when SIEs experienced on-the-job embeddedness, shocks were more likely to precipitate mobility, whereas off-the-job embeddedness positively moderated the relationship between shocks and turnover intention.

Two other papers offer novel insights into SIEs' careers. Chen and Shaffer (2017), in a densely argued paper, include data from 147 SIEs on the effect of expatriates' perceived organizational support (POS) on organizational and community embeddedness. They differentiate between financial, career and adjustment POS and analyse the distinct influences of different forms of POS and community embeddedness. Their findings indicate that different types of POS were associated with different types of motivation. For example, financial POS was associated with controlled motivation while career and adjustment POS were associated with autonomous motivation. In addition, they report that SIEs who are more autonomously motivated for expatriation were more likely to perceive higher levels of organizational and community embeddedness. Finally, autonomous motivation mediated the relationship between career and adjustment POS and organisational embeddedness and between adjustment POS and community embeddedness.

Haak-Saheem and Brewster (2017) in their seminal study of 41 low-status expatriates<sup>2</sup> in the United Arab Emirates found strong evidence that the human resource management of these lower-status SIEs diverged significantly from the HRM afforded to their higher-status

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<sup>2</sup> These are the expatriates in manual and/ or menial jobs who have come to high-income countries to work at comparatively low salaries and sometimes live in very poor conditions, with the objective, for most of them, of sending money back to their (poorer) low-income home countries where other members of their family are living.

counterparts. For example, company policies were less strategic and more ad-hoc with less emphasis and attention on managing, motivating and retaining them. Consequently, the recruitment and deployment of these SIEs tended to focus only on labour supply rather than any meaningful vocational career outcomes. 'Career' for low-status expatriates was thus an economic endeavour concerned with saving as much money as possible for as long as possible before having to go home.

### **WHERE TO NEXT? A FUTURE RESEARCH AGENDA**

We based this article on a SLR of empirical research on SIEs, identifying the most influential articles through citation analysis. Our review of the main themes indicated that the topics can be grouped into four main categories: analysis of the types and distinctions of SIEs, motivation to undertake self-initiated expatriation, SIEs' adjustment to the new country, and SIEs' careers and outcomes. In the following sections, we propose a future research agenda. We first identify future avenues of research for each of these four main research themes. We then expand the discussion to other areas that appear as important concerns for future research on SIEs. Lastly, we address the limitations and contributions of this paper.

#### **Types and Distinctions of SIEs**

##### *Nature of samples*

With regard to the types and distinctions of SIEs, we need more clarity on the specific nature of our SIE samples. The challenge within the existing research is that the diversity of the SIE population is often ignored, with all kinds of internationally mobile employees aggregated under the general 'SIE' title. Nearly all of the top-cited studies in this paper apply various controls to their research (age, gender, country, etc) but generally, probably because the small sample sizes do not allow further analysis, draw no conclusions from these differences. Furthermore, when specific types of SIEs are studied, the findings are rarely compared with other types of SIEs. This then leads to a situation in which it is difficult to make any rational comparisons of types of SIE across studies. For example, the motives of SIE nurses may be very different to the motives of C-suite professionals. Of course, the AE population too also includes different types of employees working in different kinds of organizations and in different contexts, but the diversity appears to be even wider among SIEs. We need to fully capture such diversity by expanding our research agenda to the various types of SIEs not yet studied and to undertake serious comparisons between the types of SIEs we do study.

### *SIE contexts*

Expanding our research agenda means taking into account different sources of diversity: individual, organisational and broader contextual factors. At the individual level, our attention has been focused for the past two decades on mostly high-status SIE professionals, which ignores that there is almost certainly an unresearched population of mid-range and low-status SIEs, among them teachers, health professionals, maids, construction workers, factory employees, retail and beauty assistants, and marine workers. The SIE research conducted so far shows that there are also more women and more young people heading abroad as SIEs. It would be valuable to know more about their family situation: how do single SIEs differ from SIEs with partners and children in terms of their motivation to go, adjustment, repatriation, and career outcomes? Does the age and nationality of children impact on SIEs' motivation and outcomes? What are the implications? To be fair, such diversity has been little studied amongst AEs but the point remains: we need more research on SIEs, given it is a rapidly growing population that tends to outnumber AEs.

In terms of context, and in comparison, to AEs the SIE population covers many different professions – aid workers, teachers, sport professionals, security guards, maids - whose work context is very different to that of corporate businesspeople. Unlike AEs, many SIEs work outside MNEs, in smaller local private companies, in the public sector (e.g., military and civilian, IGOs), or in the Third sector of NGOs or not-for-profit organizations. Thus, their entire expatriation experience can be expected to differ from those within MNEs that have more sophisticated expatriate management processes. Charity workers, for example, are often working in rural environments, long distances from the modern facilities and other infrastructure familiar to most AEs and many other SIEs. In a similar vein, our evidence is often drawn from SIEs from Western, developed countries meaning that we have very little research, for example, on Arab, African, Asian or Latin American SIEs (Al Ariss, & Özbilgin, 2010; Lee, 2005). Overall, the body of research thus far that examines SIEs has largely ignored contextual differences by failing to make comparisons that adds new knowledge to our understanding of the SIE experience. We need to pay more attention to contextual differences. Practically, there are two options for better SIE research in the future: we need larger, more diverse SIE samples that allows for more detailed comparisons, and we need studies of carefully specified SIE populations allowing for comparison between them.

Importantly, we then need to take SIE type more carefully into consideration when reporting and interpreting findings.

We know much about some sectors, such as academics. But there are other sectors we know almost nothing about. What about missionary SIEs (Ramboarison-Lalao, Brewster and Boyer, 2020)? After all, religious belief/conviction has been the motivation for SIEs going back centuries. What can we learn from them? Can we understand contemporary SIEs better through their motivation?

The studies that we have so far are of limited kinds of SIEs and the findings are, broadly, assumed to apply to all SIEs. We believe that is unlikely to be true. What we need are more studies that examine un-researched, or less-researched groups of SIEs, and more studies that compare different groups of SIEs, in terms of demographics and context. As we build up these studies, we will begin to have a better understanding of the full range of SIEs and the issues they face.

### **Motivation to Undertake Self-initiated Expatriation**

The motives of SIEs to change country have, as noted, already received quite a lot of attention. But almost all of these have been cross-sectional studies. Do motivations change over time? Is the motivation to become a self-initiated expatriate the same as the motivation to stay one? Is it the opposite of the motivation to return home? In other words, how does motivation change over time?

In addition, in terms of motivation, it is becoming increasingly necessary that we research the motives of those who are minorities or who are disadvantaged in their home countries, given their numbers are rising. Too much of our research about SIEs, to date, has followed the assigned expatriate literature and concentrated on elites (cf. McNulty and Brewster 2020). We know little about the experience of those who are not the elites. Although it seems that there may be more women SIEs than there are women AEs, still most of what we know about the motivation of SIEs comes from men. Are the motivations of the women who choose to become SIEs the same as, or different from, men SIEs? Do they find their options are more or less or similarly restricted by gender assumptions and discrimination as they were at home? We still do not understand why there are fewer women than men SIEs or what can be done to create parity. We have almost no information about black and ethnic minority self-initiated expatriates from the developed world and almost none at all about those from the underdeveloped world. We are in a similar position with people from different religions –

does a deep-seated religious view of the world affect the motivate to move to another country? Does it vary between religions? Does it vary between the countries to which they go? What about the situation of homosexuals or other people who do not fit the majority heterosexual family picture? Anecdotally, we know that some people have changed countries to avoid persecution to go to a country where they felt more comfortable, but there is still much to learn here. What about divorcees?

For all these people: are their motivations different and, if so, how? What are their specific motives to move abroad? Do they move abroad in the hope of escaping their minority/unwelcome status/ situation? How do they search for and find their work abroad? Do they fare better in the host countries? Does it help or hinder them to cope better when they experience discrimination in their new country? How do they adjust in their host country? What are the factors that facilitate their adjustment, performance, and (subjective, objective) career success in the host country?

We need to understand how what applies to one group of SIEs might be wrong for understanding another group. For example, we have little knowledge of the motives of low-status SIEs – extraordinary ‘ordinary’ people who take the astonishingly brave decision to go to work in another country, alone, to ensure the well-being and future of their families back home. It seems plausible that their motivation will be very different from well-educated SIEs from rich countries. What makes them do it? Why do they, rather than other people in a similar situation, make that choice? And what do they think of their decision years later? Another set of sub-groupings concerns home and host countries. We need more evidence of a wider range of countries in both cases. Do SIEs from less developed countries have more or fewer issues than those from the more typically studied developed countries?

Lastly, the world is changing, in broadly centuries-long sweeps. International movements of workers have gone from being mostly the old European empires sending people to their colonies, to the nineteenth century movement of people between the rich trading nations of the Triad (North America, Europe and Japan), to the twentieth century flow of people being reversed so that now the movement is from the underdeveloped countries to the rich countries and in many cases from the old colonies to the old colonizer. People are now attracted to the old empire countries because they are rich, they speak the same language and share elements of the same culture. But post-colonial theory (Bhabha, 2004; Said, 1978) tells us that it is likely that people moving to an ex-colonial nation may receive much rougher treatment than



people from a richer country. We need more research on this new development in international working trends.

### **SIEs' Adjustment to the New Country**

Since expatriate adjustment is one of, if not the, most studied aspect of expatriation, it is not surprising to find many adjustment studies among SIEs as well. One problem with even these most-cited papers, however, is that, with the notable exception of Shaffer *et al.* (2016), there is continued use of the Black and Stephens (1989) scale of adjustment despite the fact that it has little conceptual basis, was created from a statistical analysis of a small and dubious database and confuses adjustment in different dimensions and domains (Hippler, 2000; Haslberger *et al.*, 2014; Thomas and Lazarova, 2006). We need more studies of SIEs' adjustment that differentiate between their adjustment in the knowledge, feelings and behaviours dimensions and that examines their adjustment in different domains. We need more studies that examine the spill-over and cross-over effects of adjustment and which examines adjustment from different perspectives (i.e., the expatriate may feel adjusted and believe they are behaving correctly but do their work-colleagues and bosses share that feeling?).

Further, presumably because many SIE samples are small and division would create problems, the quantitative SIE studies collate expatriates with different lengths of stay in the host country although, as Hippler, Brewster & Haslberger (2015) note, it means averaging out the adjustment of expatriates who have been in the country, say, five days, five months and five years, when clearly one might expect them to be differently adjusted. We need more research that recognises the importance of adjustment over time (Fontinha and Brewster, 2021; Hippler, *et al.*, 2015).

We need more studies of adjustment of different kinds of SIEs, particularly low-status SIEs, and studies of SIEs from different countries of origin and in different locations. Do SIEs *from* different countries adjust differently? Do SIEs *in* different countries adjust differently (Waxin & Brewster, 2020)? What are the individual, organisational and contextual factors that reduce the different types of SIEs' job performance and time to proficiency (Waxin, Brewster, Ashill, 2019; Waxin *et al.*, 2016; Lessle, Haslberger and Brewster, 2021)?

### **SIEs' Careers and Outcomes**

Our review indicates that while there has been a lot of interest in the careers of SIEs, as shown by both the raw number of papers on this topic and the number of citations, in most cases we find only single studies reporting findings on specific issues in careers. When this is combined with the diversity of the SIE population, there is clearly a need for more research across different types of SIEs from different contexts. For example, research on expatriate career success has led to very mixed findings and one of the reasons is probably the diversity of expatriate populations. For example, it has been reported that there may be negative impacts of expatriation on perceived employability among SIEs in Ireland (Begley, Collings & Scullion, 2008), although a statistically representative study of SIEs in Finland reported, on average, positive impacts of the time abroad on their perceived marketability (Suutari et al., 2018).

There is a clear need for more longitudinal career research, since career impacts of expatriation may differ over time, leading to different conclusions. That would broaden our approach from single assignment issues to a longer-term career discussion. There is already some existing research on global careerists (Bozkurt & Mohr, 2011; Suutari, Tornikoski & Mäkelä, 2012) showing that they often combine different types of assignments during their careers (AEs move to local companies as SIEs, or experienced SIEs take AE positions within MNEs, or become immigrants staying permanently in their new country, etc). We know too little about these kinds of career moves and transitions in the international context (Ramboarison-Lalao, Brewster & Boyer, 2020). McNulty and Vance (2017) have emphasized the need for more research on the global career phenomena and on movements along an SIE-AE career continuum that encompasses different types of assignments. Their premise is that while people may have different career orientations, such as the internationalism career anchor found amongst many SIEs (Suutari & Taka, 2004), career orientations can change to fit the individual's professional needs and personal circumstances. Career orientations and choices are not fixed and take place in circumstance that, at any particular point in time, may offer more or less opportunities for an individual to choose from. What we know for sure is that expatriation can change the career interests of professionals (Suutari, 2003). The value and impacts of expatriation may be seen differently if the outcomes are measured in the longer-term rather than soon after repatriation (Dickmann et al., 2018). Examining single assignments is inevitably limited. If we take a longer-term approach to international careers, we are able to recognize different types of career paths with different kinds of career outcomes (Andresen & Biemann, 2013; Suutari et al., 2018).

A good example of the possibilities that longitudinal research can provide is the Tharenou and Caulfield (2010) study, which is among the most-cited SIE papers. In this study, the authors collected data in two rounds with one year between them. This made it possible to analyse the repatriation experiences as a model having different stages. In the model, different push and pull factors are connected with intention to stay, which is related to job search and further repatriation. While expatriation is always a process with different stages, longitudinal studies can provide further insight as to how the process evolves and the outcomes of the experience, providing stronger evidence of causal relationships and making it possible to test moderating and mediating effects. For example, in career research more broadly there is a lot of evidence from longitudinal studies of different mediators (for a review, see Spurk, Hirschi & Dries, 2018). SIE research has real possibilities that are opened up in longitudinal studies.

### **Theory-driven Classifications**

We must aim toward more theory-driven classifications of SIE types beyond the exploratory approaches that may have been useful in the early stage of SIE research. For this reason, there has been some criticism of the entire research stream on SIEs. Most of the critiques that have been applied to SIE studies have also been applied to expatriation studies in general: this is a largely ‘theory-lite’ research area with most studies being descriptive or even prescriptive, and research samples tending to be small and non-representative. There is a tendency towards using cross-sectional data and, because the range of home and host countries studied has been so limited, cases are therefore atypical and measures are unreliable (see the critiques in Cascio, 2012; Kraimer *et al.*, 2016; McNulty and Brewster, 2017).

For SIE studies in particular there is a concern that as businesses have become less willing to grant researchers access, many scholars have reverted to on-line surveys where they often have no idea of the response rate or the representativeness of their sample. Consequently, much of this SIE research has been published in less prestigious journals where the criteria for acceptance are less demanding, which, in turn, makes this research less ‘visible’.

Remember, in this paper we are assessing the most visible studies based on citations (n=26), noting that there are large numbers of other studies that have had far less influence. We are starting to see further development in this area and more papers on SIEs are beginning to be published in high quality journals (e.g., Bozienelos, 2009; Tharenou & Caulfield, 2010; Chen and Shaffer, 2017; Haak-Saheem & Brewster, 2017; Suutari *et. al.*, 2018). As ever, there

remains a place for publications in all levels of journals, but scholarly respectability requires publication in the top journals too and we hope to gradually see more studies of SIEs published in such journals.

As indicators of the direction we need to go in, we believe that there is a need not just to study but to theorise (develop our understanding) of some key SIE subjects, such as: the role of language in SIE adjustment, performance and satisfaction; the role of religion in these same areas (is moving to a country with a similar religious background easier? And if so, why?); and the role of intermediaries (many SIEs get their jobs via labour market intermediaries (how are we to understand the effect of that on their employment, their HRM and satisfaction?).

As authors, we believe in the importance of clarifying constructs so that it is clear to our readers precisely who and what we are studying - greater clarity must be good for our research – but we also need to recognise the common processes of movement between categories. Thus, SIEs can become migrants (staying on in their new host country), or they can become AEs (having their contracts changed by their employer); AEs can become SIEs (if they decide to stay on in the country they have been sent to, or to move to another employer) and migrants can also decide that things are not working out for them in their chosen country and become SIEs. How are we to explain these kinds of fungibility? Or, perhaps more to the point, how are those involved able to manage such fungibility for themselves and, for scholars, how do we practically manage the fungibility between these groups when doing research? Our advice would be either to maintain the focus on the category and drop cases of people who no longer fit the criteria, thus keeping the constructs ‘clean’; or to study the processes involved and focus on developing our understanding of such changes.

### **Practitioner-focused Studies**

Our review indicates a strong dominance of the individual perspective in SIE research (SIEs themselves), which strongly suggests that we need more research on the management of SIEs from the employers' perspective. In AE research, we have a research tradition related to the HRM of expatriates including such topics as expatriate selection, training and development, rewards, repatriation and so on. But, taking an IHRM perspective, we see a notable lack of research on the value of SIEs within the business. SIEs are usually, though not always, recruited from the local labour market and invariably managed as part of the local labour

force. But, in comparison to local citizens, they bring additional knowledge of the previous countries they have lived in, language skills and experiences of internationalisation. Are they better treated in that way among a local labour force or better treated as part of the mix of an international workforce? How would that work in practice? How should SIEs be managed, compensated and have their performance measured (McNulty and Brewster, 2019)? Some businesses are explicitly using SIEs as boundary-spanners, people who are able to speak the local language, understand local cultures, have good connections locally, and also relate to AEs from headquarters and directly to others at headquarters (Furusawa & Brewster, 2018). There is scope here for much more research that is focused on employers of SIEs.

## CONCLUSION

Self-initiated expatriates have been travelling the world long before passports were invented, long before country borders were settled and certainly long before assigned expatriates began to be sent to other countries. There is no reliable database of the numbers of SIEs (they fall between the cracks of the political/ economic measures that exist for internationally mobile workers (that construct clarity problem again) but it seems almost certain that there are many more of them than there are of AEs. The global COVID-19 pandemic is likely to exacerbate the differences in numbers. If we are to get a full understanding of the field of global mobility, this is an important group of workers to study. They have now been brought to the attention of scholars and there are fortunately increasing numbers of scholars wanting to pick up that mantle and research SIEs. We look forward to more carefully constructed studies of SIEs, to studies using a wider range of research technologies, to studies of a wider range of types of SIEs, and SIEs from a wider range of countries. A start has been made – the journey continues.

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**Figure 1: Selection process for the Top Twenty-Six most-cited empirical articles on SIEs (2000-2019)**

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