
Foreword

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My introduction to the world of expatriates came in 1978 when I became one. Up to that point I had never lived or worked outside the United States (US). Despite no previous experience or understanding, I moved to Japan to work full-time as a young missionary. What I encountered experientially then, we empirically know now: that on many if not most dimensions of culture, Japan and the US are quite far apart. Thus, I was introduced to the challenges and rewards of being an expatriate in a fairly intense way. The differences between the language, customs, culture and religion that I knew from the US and what I experienced in Japan could not have been greater. They were so large that early in my two-year experience I briefly thought about going back home. Ironically, it was getting close to quitting that actually inspired me to dig deeper and work harder to understand and speak the language, relate more effectively to the Japanese people, and adjust to the culture in general.

Nevertheless, because I lived in more rural parts of Japan and I saw very few other expatriates in Japan, my understanding of expatriation was based on my own experience and that of other missionaries who I knew. At the time, I had little to no idea what expatriation was like for athletes, business executives, government officials and so on in Japan, or in any other country for that matter. After two years I left Japan and returned to the US, fascinated not only with Japan but also with the whole issue of expatriation.

After earning a master's degree, I returned to Japan to work as a consultant in Tokyo. This time, in addition to my own experiences as an expatriate, I witnessed the experiences of many others, including TV personalities, business people, athletes and government officials, not just from the US but also from various other countries, as they lived and worked in Japan. I knew many of these individuals well enough that I also saw how their spouses and children experienced expatriation. In addition, my work as a consultant advising Japanese companies on their international expansions gave me significant exposure to the experiences of Japanese expatriates and their families in various parts of the world. In the process I became enamoured with trying to understand the nature of expatriation and the factors that made it more and less successful. As my good friends Yvonne and Jan point out in Chapter 1, the 'Introduction' of this *Research Handbook*, back in the 1970s research on expatriates was just getting started, and even into the 1980s there was no established body of theoretical or empirical work.

Frustrated that I had many more questions than answers about expatriates and expatriation, once again I returned to the US and began my own formal study and research of expatriates and expatriation, first as a PhD student at the University of California, Irvine, and subsequently as a faculty member at Dartmouth College. Some of that empirical work, with colleagues such as Hal Gregersen, Greg Stephens and the late Lyman Porter,

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and more especially the theoretical work with colleagues such as Mark Mendenhall, Gary Oddou and Hal Gregersen, had some reasonable impact on the field. However, most of my early work and that of various scholars at the time focused primarily on business managers and executives sent on international assignments, and to a lesser extent on their families. While this was and continues to be an important population of expatriates, the field has grown far beyond.

For one category of expatriates, there has been a return to the past: the study of non-corporate expatriates. Back in the 1960s and even 1970s, this was a primary category of focus. This category includes missionaries, international aid workers, government officials and military personnel. The resurgence of research about this group of expatriates is important.

Even in the area of corporate expatriates, we have also returned to the past in the study of what one might term 'career expatriates', or those who move from one international assignment to another. Back in the 1970s and 1980s many corporate expatriates had this career pattern, because once one was 'out of sight, out of mind' career-wise it was hard to go home. While this category never really disappeared, it changed. Whereas previously such an international assignment pattern was unlikely to elevate one to top corporate leadership positions, in some companies it now is the dominant path to such positions. As a consequence, research on this group has re-emerged with a strong focus on the career issues and not just the expatriation challenges.

Within the corporate expatriate category, there has been an important and necessary increase of focus not just on the 'primary' expatriate but also on the spouse and children. Importantly, this research has not only included the personal expatriation issues of these related individuals but has also focused on the interactive social systems effects.

While traditional corporate expatriates sent on assignment for three to five years have been, and remain, a key group, companies have increasingly sent individuals on short-term assignments. As a consequence, scholars have tried to understand the nature of this set of expatriates and explored what is similar and different for them versus the more traditional international assignee.

As companies have globalized and recognized the value of a network of leaders around the world who have personal knowledge of and relationships with each other, they have increasingly brought foreign nationals into corporate and 'home' office locations in the form of 'inpatriation'. As this activity has grown, so too has the research on it and our understanding of the experience of this category of expatriates.

In addition, as more individuals have moved from temporary to permanent or localized status in a given country, scholars have increasingly studied this group of expatriates. This growing body of research is trying to understand what is similar or different for those living and working in a 'foreign' country on a very long-term rather than short-term temporary basis. In addition, scholars in this area are trying to understand the nature of work role adjustment when aspects of general cultural adjustment have been rendered less relevant because the individuals have already resided in the country for some time.

What is perhaps the newest set of expatriates for study are those who have self-initiated their expatriation rather than having been sent by an organization. Changes in work visa status and approval processes within the European Union in particular, as well as other countries such as Singapore, have given rise to individuals being able to move to a new country on their own in search of job and career opportunities. Scholars in this area are

again trying to understand the expatriate experience for this set of people, and how it is similar to or different from the other categories mentioned.

From my perspective, this increase in the types of expatriates and the study of them is exceedingly helpful for the field. As is true of any scientific field, we need a pool of related yet diverse subjects in order to determine, from a theoretical standpoint and supported from an empirical perspective, what is common across types and what is unique by type. For a scientific field, this requires some scholars and researchers to look deeply within certain types of expatriates and, once enough is known within types, for other scholars to look across types.

In my view, this *Research Handbook* is a key step in that process. We now have enough research on particular types of expatriates that whole chapters in this *Research Handbook* can be dedicated to a review of that research, such as Chapter 9 in which Jan Selmer, Maïke Andresen and Jean-Luc Cerdin focus on self-initiated expatriates. With the collection and review of the literature on the various categories and types of expatriates, it becomes easier to hypothesize about what is common and different, and why. This broader theory building is critical for the development of the field.

As Thomas Hippler, Arno Haslberger and Chris Brewster note in Chapter 4, the expatriate adjustment process, including the direct and interactive effects, can be conceptually quite complicated. However, this is true of any important social process. In social sciences there is no precedent for explaining 100 per cent of a phenomenon. Rather, what is needed is an understanding of the phenomenon across enough different situations that a theory can be built that identifies the dynamics that are relatively constant and why, as well as identifies dynamics that are heavily influenced by situational factors and what the most influential factors are and why. This theory building work needs to result in clearly articulated and testable hypotheses. This in turn enables the more consistent, and often more correct, operationalization of the key variables in the theory. All of this then subsequently enables the reliable comparability of results across studies.

While early work, such as my own with colleagues Mark Mendenhall and Gary Oddou, has tried to nudge the field in this direction with some modest success, more work is needed. For example, the two major meta-analytic studies done to date (Bhaskar-Shrinivas et al., 2005; Hechanova et al., 2003) used our theory as the organizing model, and while the results largely supported the theory, there were important non-significant findings. The authors of these meta-analytic studies pointed out that some of the non-significant findings may simply have been a function of different operationalization of variables rather than any underlying flaw in the theory. This is impossible to know until the field progresses to the point where different theories competing to explain the phenomenon are clear enough and contain both testable hypotheses and recommended operationalization of variables that they can engender better empirical studies that result in more definitive accumulation of evidence.

In pulling together this *Research Handbook*, Yvonne McNulty and Jan Selmer have helped the field to take an important step in this direction. The extant literature, both theoretical and empirical, is today large enough that consolidating it is a requisite step. This is exactly what the *Research Handbook of Expatriates* has done. It now remains the challenge of all scholars interested in this domain to leverage this monumental work and press forward with better theories containing testable hypotheses and solid operationalization of variables to drive better empirical work. I am confident that this new generation

of theoretical and empirical work is forthcoming and that the *Research Handbook of Expatriates* will play a pivotal role in its emergence.

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