1. Introduction: overview of early expatriate studies, 1952 to 1979

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Expatriation as a teaching and research subject has existed for more than 60 years. Although it is often assumed that the birth of expatriate studies occurred in the 1980s with publications by Rosalie Tung (1981, 1982, 1984a, 1984b, 1986, 1987, 1988a, 1988b) and J. Stewart Black (1988), or perhaps a little earlier with the now-seminal study by Anders Edstrom and Jay Galbraith (1977) about the reasons for using expatriates, a review of extant literature shows that a substantial body of expatriate research existed well before this time. While much of this early literature, and most especially pre-1970, was lacking in theoretical grounding and with only a few empirical studies published, it nonetheless provided an initial foundation upon which subsequent research and interest in expatriate studies would come to be based.

OVERVIEW OF EARLY EXPATRIATE STUDIES – 1952 TO 1979

The field of modern expatriate studies had its earliest beginnings at the turn of the century with Lay's (1925) exposé of expatriates in the Foreign Service. While the concept of working abroad in a professional capacity did not begin to be formally studied until the 1950s, it was borne out of research in the 1920s and 1930s that looked at personnel administration, for example, with the establishment of the *Journal of Personnel Research* in 1922, and the *Society for Personnel Administration* founded in 1937 (now the *International Personnel Management Association*/IPMA). There was also an ongoing interest during the 1940s about the acculturation of overseas military personnel during World War II (Henry, 1946) and the adjustment and repatriation of post-World War II populations (Leuba, 1942; Shils, 1946; Spicer, 1945).

Formal study of expatriates began in the 1950s (e.g., Fayerweather, 1959) with the publication of articles about their training (Lesser and Peter, 1957) and selection (see Mandell, 1958; Mandell and Greenberg, 1954; Woodruff, 1952), of which the latter appeared in two of the earliest practitioner-oriented human resource management (HRM) journals: *Personnel Journal* (1928–1996; formerly the *Journal of Personnel Research* from 1922 to 1927), known as *Workforce Management* since 1997; and *Personnel Administration*, superceded by *Public Personnel Management* in 1973. A set of studies in the same decade by Gouldner (1957, 1958), in *Administrative Science Quarterly*, suggested that differences found among two types of employees ('locals' and 'cosmopolitans') reflected a significant tension between an organization's simultaneous need for both loyalty and expertise;[1] the precursor to what would be adapted in a substantial body of

[1] Gouldner (1957, 1958) explored differences in manifest and latent organizational identities among locals

research in later decades about expatriate commitment and turnover. One journal that focused more specifically on expatriates at this time was the *International Executive* (now *Thunderbird International Business Review*/TIBR), which in 1959 published some of the first articles about the expansion of American companies abroad, including the challenges associated with managing 'overseas executives' (see Crowther, 1959; Howell and Newman, 1959; Huson, 1959; Peter and Schlesinger, 1960; Thompson, 1959; Wallace, 1959).

The formal study of expatriates in the 1950s and 1960s undoubtedly arose from three correspondingly related topics for this time. The first was a keen interest in international business and multinational firms within the American management discipline by the likes of Dunning (1958), Penrose (1959), Perlmutter (1967, 1969) and others (e.g., Fayerweather, 1969; Fouraker and Stopford, 1968; Hall, 1960; Kindleberger, 1969; Kolde and Hill, 1967; Linfield, 1960; Robinson, 1964). A second impetus came from research on inter-cultural and cross-cultural transitions; see, for example, Lundstedt's (1963) special issue on cross-cultural research in the *Journal of Social Issues* (see also Bailyn and Kelman, 1962; Berry, 1969; Gullahorn and Gullahorn, 1963; Katz and Eisenstadt, 1960; Lysgaard, 1955; Moore, 1961; Nath, 1968; Oberg, 1951, 1960; Useem et al., 1963). A third topic was related to a burgeoning field of interest about foreign students' exchange programmes and their adjustment whilst abroad and upon returning home (e.g., Bennett, 1958; Coelho, 1962; du Bois, 1956; Lambert and Bressler, 1956; Morris, 1960; Schild, 1962; Scott, 1956; Selltiz and Cook, 1962; Sewell et al., 1954; Sewell and Davidsen, 1956; Veroff, 1963), most notably with Useem and Useem's (1955) book about Western-educated Indian students' return from study abroad.

While most of the topics that we study today may appear to have emerged only within the past 30 years (since the 1980s), many were in fact first observed, studied and published in the 1960s when expatriates began to be recognized as pivotal employees likely to foster organizations' growth into international markets. For example, although the *Academy of Management Journal* was launched in April 1958, partly in response to the advent of corporate globalization, the first article alluding to the concept of 'international management' was published with Neghandi and Estafen's (1965) paper about the transfer of 'American management know-how' to different cultures and environments. Research in the 1960s focused predominantly in key areas that we have since come to know well, including overseas personnel management (now international HRM: IHRM) (Myers, 1965), and expatriates' compensation (Bivens and Greene, 1969; Patton, 1962; Schollhammer, 1969), performance (Peter and Henry, 1962a), development (Chorafas, 1967), selection (Hodgson, 1963; Ivancevich, 1969a; Peter and Henry, 1962b; Steinmetz, 1965, 1966; Triandis, 1963), knowledge transfer (Negandhi and Estafen, 1965), culture shock and cross-cultural training (Byrnes, 1966; Chemers, 1968; Harrison and Hopkins, 1967), adjustment (Deutsch and Won, 1963; Nash, 1967), and success factors (Ivancevich, 1969b; Newton Parks, 1963; Vivian, 1968). Also emerging were a number of studies of expatriates in non-corporate settings (Campbell, 1969; Gordon, 1967; Hapgood and

and cosmopolitans, finding that differences existed between each in terms of degrees of influence, participation, propensity to accept or reject organizational rules, and informal relations. The study was important because it explored dimensions of organizational loyalty, defining cosmopolitans as being low on loyalty to the employing organization, high on commitment to specialized role skills, and likely to use an outer reference group orientation; while locals were defined in the opposite way.

Bennett, 1969; Henry, 1965, 1966; Mischel, 1965; Porter and Mitchell, 1967; Smith et al., 1963; Taylor, 1968). Notable was that, well into the 1960s, much of the literature about expatriates referred to them in other terms: for example, as 'overseas Americans' (Cleveland et al.,1960), 'overseas personnel' (Stern, 1966), 'overseas executives' (Gonzalez and Negandhi, 1967; Haider, 1966) and 'international manager' (Kiernan, 1963).

A little known but striking feature of expatriate research in the 1960s is the launch of management journals that contributed greatly (then, as well as now) to supporting the publication of expatriate studies. Among them is *Management International Review* (founded in 1960) (see Borrmann, 1968; Megginson, 1967 as examples), *Human Resource Management* (launched in 1961) (see, e.g., Steinmetz, 1965, 1966), *Columbia Journal of World Business* (launched in 1965 and now *Journal of World Business*) (Haider, 1966; Vivian, 1968), and *California Management Review* (launched in 1958) (see Negandhi, 1966 as an example). Other articles about expatriates were simultaneously published in practitioner outlets; for example, with a slew of articles appearing in *MSU Business Topics* (e.g., Gonzalez, 1967; Hodgson, 1963; Murray, 1973; Root, 1968; Schollhammer, 1969), a journal published from 1967 to 1981 by the Graduate School of Business Administration at Michigan State University.

Although it likely went completely unnoticed, one of the first 'industry reports' was published in 1966 by Enid Baird Lovell of the National Industrial Conference Board (now The Conference Board), which appeared as a short write-up in the 'research roundup' section in the *International Executive* (now TIBR). The 248-page ground-breaking report was based on findings of a study of 150 companies and concluded that the trend towards 'global management structures' resembled little more than primary responsibilities for international activities being delegated (or relegated) to only one international executive.

While research in the 1950s and 1960s provided the initial impetus for expatriate studies, it was not until the 1970s that a solid base of empirical and theoretical research emerged to take the field forward into what it has become today. The launch of the *Journal of International Business Studies* in March 1970 saw the study of expatriates being fuelled by a broader interest among scholars about multinational enterprises (MNEs) (e.g., Boddewyn, 1979; Johanson and Vahlne, 1977; Stobaugh, 1970) and a specific interest in international business education (see Beazley and Folks, 1975; Daniels and Radebaugh, 1975; Janavaras, 1975), with the latter guiding the establishment of courses and programmes in this 'new, unmapped area' (Terpstra, 1970, p. 89). The focus of some of this research (including in other journals) centred on MNEs' international operations (Beer and Davis, 1976; Daniels et al., 1976; Hymer, 1976; Keegan, 1974; Ringbakk, 1972; Stopford and Wells, 1972), internationalization processes (Casson, 1979; Caves, 1971, 1974; Johanson and Wiedersheim-Paul, 1975), expansion efforts (Buckley et al., 1978; Donaghue, 1973; Holt, 1973, 1977; Rhodes, 1972; Vernon, 1971), industrial relations and trade unions (Roberts, 1972; Warner and Turner, 1972), and issues related to global staffing (Chruden and Sherman, 1972; Davis, 1979; Imundo, 1974; Lewis, 1971; Newman, 1970; Smith, 1974; Zeira, 1975). Other studies and commentaries explored international management practice more broadly (Baker and Ivancevich, 1970; Beeth, 1973; Desatnick and Bennett, 1977; Lewis, 1971; Voris, 1975), and expatriates more specifically (Egan, 1976; Hays, 1972; Shetty, 1971), including a number of lengthy articles appearing in *Harvard Business Review* extolling the challenges and opportunities of managing 'international executives' (Crafts, 1979; Foote, 1977; Heenan and Keegan, 1979; Perlmutter and Heenan, 1974; Sirota and Greenwood, 1971). It was in 1977 that the reasons why companies used expatriates began to be studied more theoretically, with the publication of Edström and Galbraith's now-famous article about the transfer of managers as a coordination and control strategy in multinational organizations, which appeared in *Administrative Science Quarterly*. Interestingly, while many scholars were suggesting an increase in the use of expatriates, others wrote about their doom, suggesting that:

> [n]ot much can be done to save international executivism from disappearing gradually under the impact of growing nationalism, but companies with foreign affiliates can note the symptoms of a concerted push to discourage foreign managers and take some measures, discussed here, to prolong – possibly – the practice of placing foreign managers. (Howard, 1970, p. 11; in *Human Resource Management*)

Despite such gloomy predictions, research on expatriates continued to grow in the 1970s, with a small number of studies in non-corporate settings (Harris, 1973; Hautaluoma and Kaman, 1975; Kennedy and Dreger, 1974; Klineberg and Hull, 1979; Noer, 1974), and a much larger number of articles about corporate expatriates and their selection and recruitment (Alpander, 1973c; Baker and Ivancevich, 1971; Freemantle, 1978; Hays, 1974; Howard, 1974a; Lanier, 1979; Maddox, 1971; Miller, 1972a, 1972b; Teague, 1970; Tucker, 1974), communities (Cohen, 1977; Olden, 1979), satisfaction (Daniels, 1974; Ivancevich and Baker, 1970; Miller, 1975, 1976), families (Werkman, 1977) and compensation (Reynolds, 1997; Simone, 1979; Sonnabend, 1975; Whilte and McGowan, 1977). Critically, it was also when the first article to examine expatriate return on investment in terms of international assignment outcomes emerged as a new avenue of enquiry (see Misa and Fabricatore, 1979); a topic that would not be picked up again until the mid-2000s. Correspondingly, other empirical and conceptual studies emerged on themes that would come to dominate the field for decades to come, among them success and failure characteristics (Alpander, 1973b; Hays, 1971; Newman et al., 1978), expatriates' management styles (Alpander, 1973a, 1976), willingness to go (Miller and Cheng, 1978), performance (Stoner et al., 1972) and gender roles (Adler, 1979). During this time studies about repatriation strongly emerged as a worrying concern for MNEs (Cagney, 1975; Heenan, 1970; Howard, 1974b, 1979; Murray, 1973; Noer, 1974; Smith, 1976), thus initiating a long and extensive scholarly interest in a topic that still exists today.

The most significant topic of research to receive attention during the 1970s, and which would spawn a mass of research to come, was undoubtedly the theme of cross-cultural effectiveness (Hammer et al., 1978), including areas related to developing cross-cultural training programmes (Brein and David, 1973; Fiedler et al., 1971; Gudykunst et al., 1977; Howard, 1972; Jones, 1975; Thiagarajan, 1971; Zeira, 1979b) and improving expatriates' cross-cultural communication skills (Almaney, 1974). Another emerging topic that would similarly come to dominate the field was research about Japanese MNCs (Johnson, 1977; Pascale, 1978; Peterson and Schwind, 1977; Tsurumi, 1978; Yoshino, 1976), and Japanese management practices more broadly (e.g., Ozawa, 1979), the precursor to what would become a major focus of interest in Japanese subsidiaries in the 1980s and beyond, particularly by Black and colleagues (Black, 1988, 1990; Black and Gregersen, 1990).

During the nearly 30-year period from 1952 to 1979, the field of expatriate studies established a core group of early scholars whose names would become synonymous with research about 'international executives'. For example, Edwin Miller published a slew of empirical and theoretical articles about expatriate selection well into the 2000s (e.g., Miller, 1972a, 1976; Stahl et al., 2002) in some of the best journals (then, and now) including the *Journal of International Business Studies* (Miller, 1972b, 1975, 1977; Miller and Cattaneo, 1982), *Management International Review* (Miller et al., 1981; Miller and Cheng, 1978; Tung and Miller, 1990) and *Academy of Management Journal* (Miller, 1973). Yoram Zeira was similarly productive up until the 2000s (e.g., Izraeli et al., 1980; Zeira, 1975, 1976b; Zeira and Banai, 1984, 1985; Zeira et al., 2004) with a substantial number of publications covering topics that heretofore had not been previously researched, such as third country nationals (TCNs) (Zeira and Harari, 1977; see also Daniels, 1974), and host country nationals (HCNs) and subsidiary management within the context of expatriation and MNEs' internationalization efforts (Harari and Zeira, 1974; Zeira, 1976a, 1979a; Zeira and Banai, 1981, 1985; Zeira and Harari, 1979a, 1979b; Zeira et al., 1975; see also Daniels, 1973; Toyne, 1976). Although long forgotten today, we owe a debt of gratitude to Cecil Howard, John Ivancevich, Yoram Ziera, Anant Negandhi and Edwin Miller (among others) for pioneering early expatriate studies.

CONTENT AND OUTLINE OF THIS *RESEARCH HANDBOOK*

This is the first book to bring together expert researchers in the field of expatriate studies. The need for such a book is timely. The world is becoming smaller, with the international movement of individuals – as expatriates, business travellers, highly skilled workers and migrants – at an all time high. Expatriation is being increasingly researched and taught in business schools as part of broader and more general international human resource management (IHRM) and global business courses. Expatriates are increasing in their number and profile, with many different types, and many issues and challenges they must overcome. This *Research Handbook of Expatriates* brings together the work of some of the world's leading and up-and-coming scholars to present a solid overview of the field of expatriate studies to date, as well as to inform and excite future academic scholars and practitioners to the possibilities of conducting, collaborating on or utilizing research arising from expatriate studies.

Along with most scholars, we share a strong belief in the value of expatriate studies as a subject for study, teaching and research. We follow in the tradition of many others, in other fields and on other topics, to synthesize the body of research about expatriates to describe its history, their many types, and the various communities in which they live and work, as well as where future research can be directed. Several points are important to note regarding the focus of this *Research Handbook*. First, we make no apologies for the narrow focus only on expatriates (the people), as opposed to expatriation (the process). The latter has been covered well in prior handbooks (for example, *Handbook of Research in International Human Resource Management*, Stahl et al., 2012; *The Routledge Companion to International Human Resource Management*, Collings et al., 2015), whereas the former (to our knowledge) is yet to be tackled, with no handbook published that focuses specifically and only on expatriates and summarizes the literature as to how they experience living and working abroad. Notably, the distinction between expatriates and expatriation was one that we had to make again and again, even to authors in this *Research Handbook* as they refined and revised their chapters, such is the prevalence with which these two areas of enquiry are continually confused and/or combined. Our contribution to the broader field of IHRM is to make this distinction clearer.

Second, and related to the above, we imposed no restrictions on ourselves, as editors, in selecting chapter topics that ventured beyond corporate expatriates. Rather, we deliberately set out to find those authors who are specialists in non-corporate expatriation, including fields as diverse as the military, missionary, education, aid, diplomatic corps and sports. While we did not succeed in convincing some authors to contribute to the *Research Handbook*, we are pleased that most did; and the results are impressive for the breadth and depth of coverage. We are particularly proud to include these chapters in the *Research Handbook* to expand the field of expatriate studies beyond its traditional corporate perspective. This *Research Handbook of Expatriates* is thus an inaugural edition, of which we intend there will be more as we endeavour to fill these gaps.

Lastly, although this *Research Handbook* is focused on various types of expatriates and their experiences, we felt it was important to also include a section on researching expatriates. Here, we invited well-known scholars to write opinion pieces about their experiences when undertaking expatriate studies, including the pitfalls and problems they faced along the way. These are honest, first-person accounts of expatriate research in real time. We imposed no restrictions on how these authors might present their views or structure their chapters, being free to point out both the good and the bad, their successes and embarrassing fails, to critique the field as they felt might be necessary, and to provide sound advice. These voices are rarely heard in expatriate studies and we applaud the courage of these authors in taking up our challenge.

If there was to be only one important takeaway from this *Research Handbook* it is that there are many different types of expatriates, and their utilization is not meant to be a one-size-fits-all solution. Instead the research and case studies presented here are intended to provide researchers with options and ideas to consider, and theories and frameworks to adapt, in future studies. We believe that any researcher, regardless of their methodological preferences or discipline, will find value in the content this *Research Handbook* provides.

Part I: History of Expatriate Studies and Its Current State of Play

The first part of the book contains three chapters (including this one), which chart the history of expatriate studies from its inception in the 1950s to the present day. We believe that this part of the *Research Handbook* is somewhat unusual, if not entirely unique, on the basis that, unlike the typical format of review articles, we do not focus exclusively on seminal, ‘famous’ or high-citation studies but strive to give a thorough and balanced overview of the field from three entirely different perspectives. It begins in this chapter by us, the editors, with an overview of the early studies of expatriates from 1952 to 1979. In Chapter 2 by Yvonne McNulty and Chris Brewster, the authors provide an overview of the conceptual development of business expatriates over the past 50 years by clarifying the terms and concepts used to define them. The aim of the chapter is to establish greater construct clarity and to develop a theory-specific statement about business expatriates to guide future research. In Chapter 3 by Jan Selmer, a thematic history of expatriate studies is examined utilizing 55 years of research, from the 1960s to the 2010s, which identifies 1497 research articles and is categorized into 27 major themes and 22 minor themes, including ‘hot’ topics. This review shows that a few individuals have dominated the area of expatriate studies due to the development of research themes and specific personal circumstances. These three chapters combined provide potentially the most comprehensive and thorough review of expatriate studies to date. Each perspective allows the reader to consider not just how the field has evolved over the past 60 years, but also where it is likely to be going next, including the researchers who may be at the helm and leading the way.

Part II: Historical and Contemporary Foundations of Expatriate Studies

In Part II of the *Research Handbook*, the invited authors – all leaders in their specialty area – consider five important topics that constitute the historical and contemporary foundations of our field. In Chapter 4 by Thomas Hippler, Arno Haslberger and Chris Brewster, the authors argue for a reassessment of how we conceive of and study expatriate adjustment, by providing an overview of the theories and models of adjustment that have informed our thinking, and by offering an alternative model encompassing the dimensions, domains and dynamics of adjustment. In doing so, they raise questions about the meaning of adjustment and its contribution to the success of international assignments. In Chapter 5 by Leanda Care and Ross Donohue, the focus is on expatriate performance and includes a purposeful focus on the criterion space in terms of how it can be conceptualized and measured. The authors contend that the expatriate-specific performance components described in the literature be conceptualized as part of the overall context of the expatriate environment and in many cases are antecedent to, rather than components of, performance. In Chapter 6 by Lisa Clarke, Akhentoolove Corbin and Betty Jane Punnett, the leading authors in the area of expatriates to and from developed and developing countries discuss the limited literature on expatriates in this domain, by briefly considering the need for expatriates in the context of foreign direct investment (FDI), evidence of the growth in FDI between developed and developing countries, and differences between the two sets of countries as background to examining the literature on expatriates in this context. In Chapter 7 by David Collings and Michael Isichei, arguments are made for more research about the relationship between global talent management (GTM) and global mobility, particularly the implications of GTM for individual expatriates. The authors consider what GTM means for individual expatriates by using the expat cycle (pre-, during- and post-assignment stages) to consider how global talent systems impact upon the decisions individuals make around global mobility, their experiences while on assignment, and the career implications of global mobility in light of global talent systems. In Chapter 8 by Anthony Fee, we are introduced to the first comprehensive review of the research into the safety and security issues associated with expatriation and the management of expatriates. In a cutting-edge and concise format, the author elucidates the ways in which MNEs ensure the wellbeing of their expatriate staff when a crisis unfolds, using several illustrative case studies from a suite of recent empirical studies of MNCs with which the author has been involved.

Part III: Types of Expatriates

The six chapters in Part III review research on different types of expatriates to illustrate the increasing complexity surrounding their employment, adjustment, performance and reasons to expatriate. The emphasis here is to illustrate that expatriates exist in different forms, reflecting how the field of expatriate studies has evolved from its initial focus on only organizational or 'traditional' expatriates (white, Western and married males in their forties and fifties) to encompass a much broader range of employees. In Chapter 9 by Jan Selmer, Maike Andresen and Jean-Luc Cerdin, the focus is on self-initiated expatriates (SIEs). Here the authors enhance the conceptual coherence of the notion of an SIE by proposing a definition based on a set of conceptual criteria which differentiates SIEs from other types of expatriates and international movers. In Chapter 10 by Ruth McPhail, a thorough grounding in the issues faced by lesbian, gay, bisexual, transgender and intersex (LGBTI) assignees is provided, with the author arguing that, because LGBTI employees are often in more senior positions within management in proportion to their heterosexual counterparts and therefore in the top 10 per cent of talent often targeted for international assignments, more support from practitioners is needed to help them achieve their global mobility aspirations. In Chapter 11 by Miriam Moeller and B. Sebastian Reiche, the two leading scholars in this area provide a comprehensive and technical overview of inpatriates. They argue that inpatriates have received limited exposure in extant literature, and proceed to define and distinguish characteristics of an inpatriate from those possessed by an expatriate, including the rationale for their use, with theoretical underpinnings.

In Chapter 12 by Kate Hutchings and Snejina Michailova, we hear from the two leading scholars in this area about the issues and challenges facing female expatriates. The authors present a critique of the extant literature outlining the key themes that have attracted most scholarly attention, and offer suggestions for a more inclusive view of female expatriates. In Chapter 13 by Marian Crowley-Henry and Mary Collins, we are introduced to Millennial expatriates, the youngest expatriate employees in organizations today, who are likely to constitute 75 per cent of the global workforce by 2025. The purpose of this chapter is to familiarize readers with current research on Millennial expatriates and the recognized characteristics of this group, including how their competencies, motivations and expectations differ from those of previous generations. In Chapter 14 by Liisa Mäkelä, Kati Saarenpää and Yvonne McNulty, the authors examine international business travellers, short-term assignees and international commuters, and provide an extensive and much-needed clarification of these new forms of international working. They argue that international work within organizations is not a stable and uniform phenomenon and that new policies and practices acknowledging the specific features related to these new forms of work are necessary in order to meet the challenges of employees' work-life stress.

Part IV: Expatriates in Diverse Communities

The fourth part of the *Research Handbook* is unique in bringing together scholars whose expertise lies outside the domain of corporate expatriate studies. Here, we searched far and wide for (sometimes unknown) authors who could bring new perspectives about expatriates in non-corporate (that is, diverse) communities beyond just the multinational. Ordinarily, many of these authors do not publish in the management literature where the majority of expatriate studies are found. Thus, their perspectives draw on literature that, until now, has likely not been seen in prior studies of expatriates. As the editors, we are especially proud of this part of the *Research Handbook*, not just for the added value that the perspectives bring, but also because the inclusion of these authors into the field is likely to spark a fresh wave of collaborations and expanded thinking about the possibilities for expatriate studies in the future.

In Chapter 15 by Kelly Fisher, a United States military veteran and Air Force culture and language fellow, we are introduced to the anything-but-ordinary world of military expatriates (MEs). While scholarly studies on the ME are limited, it is generally recognized that they face professional and personal challenges beyond the typical experience for the private sector expatriate: they must not only be proficient within their occupation, but they are also held to a higher standard of conduct as demanded by their extraordinary mandate by their nation to wage violence. Repatriation from a war zone also has specific challenges for both the serving member and their family, with substance abuse, suicide and domestic violence among them. In Chapter 16, Braam Oberholster and Cheryl Doss present a thorough and thoughtful overview of missionary (religious) expatriates. Here, the authors describe the mission worldview that creates a unique and dynamic context for expatriation researchers, including the various types of missionary expatriation such as traditional (frontier), professionally qualified, spouse, community development and humanitarian, tent maker, and business as mission. An extensive literature review focuses on member care topics including family adjustments, third culture kids (TCKs), host country re-entry and adjustment, care support, burnout, persecution and motivation.

In Chapter 17 by Jan Selmer, Jodie-Lee Trembath and Jakob Lauring, perspectives about expatriate academics are reviewed and critiqued, including their high non-organization-specific capital that makes them particularly mobile in the international academic labour market. Besides a definition of expatriate academics and their detailed descriptions (including university scholars, Fulbright and other scholarship holders, and other administrative individuals engaged in the tertiary education industry internationally), the chapter also features their demographic profile, motivations to move abroad, career-related risks of expatriation, experiences at the workplace and their work outcomes, theoretical development of the field, and the types of further research required. In Chapter 18, by sports migration scholars Harald Dolles and Birnir Egilsson, the top authors in the under-researched field of sports expatriates provide an insightful overview in which they argue that sport-related transfers embody unique features that arise from attachments to place, space and identities inherent in the sporting context. Using typologies of expatriates within the sports field, they show the various ways of becoming a self-initiated expatriate in sport (SIES) and suggest why more research is needed to investigate the specific IHRM challenges in professional team sports, the potentially controversial questions of labour rights and barriers, ethical approaches to international recruitment (including the under-age talent migration of 'star child athletes' as young as nine), and issues of integration, cultural adjustment and dislocation. We conclude this part of the *Research Handbook* with Chapter 19 by Anthony Fee, featuring a comprehensive and riveting review of expatriates in 'Aidland' by the leading scholar in this area. Here, the focus is on humanitarian aid and development workers, including clarification of some of the bewildering terminology, concepts and actors that populate the sector, as well as its operating context.

Part V: Researching Expatriates and Expatriates as Researchers

In the fifth part of the *Research Handbook* we explore how to conduct better expatriate research and suggest ways in which underutilized methodologies can be applied. Here, we showcase three opinion pieces by established scholars in our field, each with a substantial track record of undertaking and publishing expatriate studies, who were invited to share their expertise and to offer advice. In Chapter 20, Phyllis Tharenou presents her thoughts on methodological issues in expatriate studies. Using a sample of 296 empirical studies of assigned expatriates, SIEs and skilled migrants published from 2005 to 2014, comparative analyses revealed problems in construct clarity for the expatriate types, while systematic differences arose in the research paradigms employed. The author argues that research is needed to explain why researchers adopt different paradigms and whether their differences affect the results. Improvements are suggested for the research process and also to help end-users to access research results. In Chapter 21, Michael Dickmann adopts a biographical stance to share his views about conducting research for, and with, practitioners. Drawing upon a long history of personal reflections and recommendations as well as views from others who have collaborated in academic–industry projects, the author provides an insightful, practical and honest eight-step process model of academic–practitioner engagement that outlines a variety of considerations and provides recommendations for practice. Six distinct forms of academic–practitioner collaboration are presented.

In Chapter 22 we hear from Julia Richardson, where she explores the use of case studies in expatriate research and signals some of their potential advantages and challenges. By drawing on published work in the field, the author highlights the criteria for ensuring rigour in expatriate case study research, examining how those criteria might be incorporated into study design, execution and subsequent writing and publication of results and professional practice, as well as themes relating to external, conceptual and internal validity.

Part VI: Future Directions in Expatriate Research

In the sixth and final part of the *Research Handbook*, three important topics are introduced and summarized with a view to providing food for thought for future expatriate studies. In Chapter 23, Kathrin Hanek presents an extensive technical review of the research on biculturals, monoculturals and Adult Third Culture Kids (ATCKs) in the context of working globally. Drawing from psychological research and empirical work, the author provides an overview of the complexities around defining identity in a global context among these groups. By integrating findings across various literatures, an identity–processes–adjustment framework is presented for understanding how individual differences in identity patterns and identity management strategies produce different adjustment outcomes. In Chapter 24, Min Wan, Romila Singh and Margaret Shaffer provide an overview and summary of the relatively scarce, divergent and poorly organized research on global families. Using a summary of the literature to develop a 2 x 2 typology that reflects the traditional and non-traditional forms of global employment and family structure, the authors define the term 'global family' and offer an agenda for future research on the role and experiences of global families. In Chapter 25 we, the editors, conclude the *Research Handbook* with a co-authored account of our combined experiences for successfully publishing expatriate research. The chapter is designed to give voice to perspectives about publishing for PhD candidates and early career researchers by providing a step-by-step guide that discusses the publish-or-perish dilemma, work–family challenges for female academics, what research on expatriates is most needed, the peer-review system, selecting co-authors, building a publishing pipeline, the practice of writing, and learning to embrace rejection. The chapter also provides an extensive list of references of the best books, articles, chapters, editorials and commentaries in the field of management and expatriate studies about writing and publishing.

CONCLUSION

This introductory chapter illustrates that the field of expatriate studies is becoming (if not already) both a necessary and a dominant area of research in the broader fields of IHRM, international business and international management. While institutional perspectives have dominated much of the early research as MNEs attempted to come to grips with their need to internationalize, over time it is the individual actors engaged in the process of expatriating – expatriate employees – that have become the central stakeholders in ensuring MNEs could meet their globalization objectives. Thus, whether one has a preference for organizational- or individual-level research, the fact remains that expatriate studies is at the centre of the global staffing discipline and is here to stay. We believe that the large and comprehensive body of work that is presented here, and which is written by both good and great scholars in the field of expatriate studies, provides an important foundation for future studies of expatriates.

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