

**Voices of experience: A comparison of alternatives against the traditional  
expatriate assignments.**

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## Abstract

Voices of experience: A comparison of alternatives against the traditional expatriate assignments

By: J. Scott Wilson

The bulk of research on expatriate assignments has been focused on traditional expatriate assignments which typically involves a timeframe of over a year or more. Research has shown that the traditional expatriate assignments are plagued by high costs, high failure rates, and low rates of retention.

Increasingly organizations are exploring other alternatives to conduct international assignments through the use of what I call the alternative expatriate assignment. These alternative assignments hold the promise of addressing some of the shortfalls of the more traditional assignments.

In this study, I apply the Dickmann & Harris (2005) traditional expatriate career capital framework to two particularly popular forms of the alternative expatriate assignment, namely the short-term expatriate assignment and the self-initiated expatriate assignment. The model looks at the individual's perspective on three important career capital categories in the model, knowing whom, knowing why, and knowing how.

While only exploratory in design and providing only cursory level of analysis, there appears to be support for the use of the Dickmann & Harris (2005) framework to explore the career capital reasons why alternative expatriate's choose to accept short-term and self-initiated international assignments.

The study highlights some key similarities and differences between the traditional and the alternative expatriate assignments and has the potential to inform organizations about the alternative expatriate values from a career capital perspective.

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## CHAPTER 1: INTRODUCTION

Modern global organizations have recognized the value of their human resources as a source of competitive advantage (Porter, 1985), yet struggle to maintain a strong international presence in the face of increasing competitive forces impacting costs (Wright & McMahan, 2011). The use of international employees has continued to expand because of the flattening of the world economy (Friedman, 2005), the rise of the developed world as an economic engine, and the movement of small and medium enterprises as competitors in international business (Tarique & Schuler, 2010). While expatriate assignments (EAs) remain a popular method for many organizations to operate globally, the costs associated with EAs have continued to rise, leading some organizations to cut assignments during the 2008 global economic crisis (Brookfield Global Relocation Services, 2009). In sync with the issue of costs, are the difficulties organizations have faced in retaining their skilled expatriate labour, in which they have invested so heavily. Research has suggested that organizations have suffered from higher expatriate attrition rates than they would like (Kraimer, Shaffer, & Bolino, 2009) and these findings are supported by practitioner research that has consistently ranked retention and repatriation as top concerns of global organizations (Brookfield Global Relocation Services, 2010). A recent text published provided over 20 different international employee types (Briscoe, Schuler, & Claus, 2009) that organizations are using in such assignments. This proliferation of assignment types is evidence of how global organizations are increasingly exploring alternatives to the traditional expatriate assignment (TEA) as a potential way to reduce their international human resources costs (Brookfield Global Relocation Services, 2010; Collings, Scullion, & Morley, 2007).

There is evidence to show that organizational leaders' perceptions of the things traditional expatriates value when making their decision about why they are going on international assignments is wrong (Dickmann, Doherty, Mills, & Brewster, 2008), providing further evidence to support that organizations are pushing assignments as a fast-track to promotion when the expatriates have indicated they clearly are not (Dickmann & Harris, 2005). Although there is growing literature about the traditional expatriate and their relationship with their organization, there is even less knowledge about the alternative expatriate assignment (AEA). It is important to understand these alternative assignments given that they are predicted to have higher prominence in the near future (Brookfield Global Relocation Services, 2010). To date, the research published on alternative assignments has focused heavily on the organizational level of analysis, representing only one side of the assignment picture (Inkson, Arthur, Pringle, & Barry, 1997, p. 355).

The purpose of my research is to explore the alternative expatriate assignment with a particular attention to the individual alternative expatriate perspective. The research is guided by three competencies first identified by DeFillippi & Arthur (1994) that are said to provide increased career capital to the employee. By providing an accurate portrayal of the expatriate's perception of their assignment, this research could guide future research on AEAs and, specifically, help organizations to have a greater insight into what the alternative expatriate values from a career capital perspective. By doing so, it is hoped that the organizations using the alternative expatriate assignment might avoid the misalignment between organizational and individual expectations found in the traditional expatriate assignment.

## The Changing Face of the Global Workforce

There are a number of factors that have influenced a change in the make-up of the global workforce. In the following few pages, I have provided an overview of the focal points leading to the reasons organizational leaders consider alternative expatriate assignments, which includes a competitive cost environment, a shift in employee career expectations, and influential changes happening in the demand and supply of the global workforce.

### *Competitive Cost Environment*

The costs associated with expatriate assignments have been shown to be very high (eg. Baruch & Altman, 2002; Brookfield Global Relocation Services, 2009).

Standardized figures on the costs for expatriate assignments are difficult to gather, and this should be expected, given the variety of locations and different firms and people involved. There is research that suggests that some TEA assignments can cost \$1,000,000 or more per year (Black & Gregersen, 1999; Kraimer, et al., 2009; McNulty & Tharenou, 2004; Selmer, 2001; Stroh, Gregersen, & Black, 1998). This amount is believable, especially when factors such as like location of the assignment, housing, and family relocation are considered (Tahvanainen, Welch, & Worm, 2005).

In their 14<sup>th</sup> annual survey report of senior human resource professionals or managers of international relocation programmes (n=180), Brookfield Global Relocation Services (2009) states that the recent sharp economic slowdown has resulted in corporate cost cutting measures that has seen a “21% drop in International Assignments” (Brookfield Global Relocation Services, 2009, p. 8). Internationally-based companies and organizations are therefore increasingly exploring the use of alternative expatriate

assignments because of the costs savings and other advantages that they offer that suggest that they will help to increase retention and assist in attracting new talent into their global workforces.

#### *Shifting Career Expectations by Employees*

The literature speaks of a shift in career expectations by participants in today's labour force (Hall, 1996; Shen & Hall, 2009). Individuals are looking to exercise control through choice involving their expatriate careers (Feldman & Thomas, 1992) and are more likely to switch organizations if they feel their career might benefit (DeFillippi & Arthur, 1994; Stahl, Miller, & Tung, 2002). Evidence in the research abounds of broken psychological contracts causing shifts in the loyalty these individuals feel to their organization (eg. Haslberger & Brewster, 2009; Rousseau, 1990; Shen & Hall, 2009). These factors have contributed to employees taking an increasing responsibility for their own "protean careers" (Hall, 1996; Shen & Hall, 2009). The protean career is defined as:

*"The career of the 21st century will be protean, a career that is driven by the person, not the organization, and that will be reinvented by the person from time to time, as the person and the environment change. (This term is derived from the Greek god Proteus, who could change shape at will.)" (Hall, 1996, p. 6)*

Because of this increased self reliance, organizations have to work harder to ensure a proper fit, but by focusing on those things that the individual values, they can increase the attractiveness of the organization to the individual through a concept known as job embeddedness (Shen & Hall, 2009).

#### *Demand and Supply of Talent*

Finally there are a number of factors contributing to the lack of available talent for international assignments. There has been increased demand for qualified expatriate personnel caused by the hyper globalization of the world economy (Tarique & Schuler,

2010). Contributing factors to the shortage of available global talent include the increasing economic importance of the developed nations of the world, the increased participation in the international markets by small and medium enterprises, and a reduction in available talent particularly in the higher developed countries due to demographical issues (Tarique & Schuler, 2010).

I have outlined a number of pressures driving organizations to consider alternatives to the typical expatriate assignment, namely the shortage of qualified talent, shifting employee career expectations, and the high costs associated with traditional expatriate assignments, that highlight the need to focus on alternative expatriate assignments.

### Research Overview

Studies by researchers on careers, in the global sense, have focused primarily upon the expatriate assignment (EA), while less detail is known about the newer alternative expatriate assignments (Collings, et al., 2007, p. 205). Most of the literature I reviewed discussing alternatives to expatriate assignments has been either of an exploratory nature (eg. Collings, et al., 2007; Inkson, et al., 1997) or from an organizational perspective (Mayerhofer, Hartmann, Michelitsch-Riedl, & Kollinger, 2004; Tahvanainen, et al., 2005).

My research has been designed to address two questions. First, can the expatriate career capital framework proposed by Dickmann & Harris (2005) be applied to the alternative expatriate assignment in the same way as has been done with the expatriate assignment. Second, what are some of the key career capital similarities and differences between traditional expatriate assignments and the alternative expatriate assignments?



The rationale for using alternative expatriate assignments has primarily focused on three key areas, including reducing costs, increasing retention, and increasing the available talent pool for possible recruitment (Farndale, Scullion, & Sparrow, 2010; Tahvanainen, et al., 2005). My research focuses on two of the most popular types of alternative assignments, namely the self-initiated expatriate (SIE) and the short-term expatriate (STE).

There is a long line of literature that includes people who seek out or “self-initiate” their expatriate assignments (Inkson, et al., 1997; Suutari & Brewster, 2000). The benefit to the organization is that these types of expatriates do not require convincing to be sent abroad, they volunteer to do so, and often travel abroad with their families, at their own expense, in search of these assignments (Collings, et al., 2007; Fitzgerald & Howe-Walsh, 2009). This type of assignment is popular with non-governmental organizations (NGOs) such as the United Nations and the European Union Commission (Suutari & Brewster, 2000). The average age of the self-initiated expatriate tends to be younger which tends to offer a lower labour cost option for firms as the alternative expatriates have a lower skill level (Inkson, et al., 1997; Suutari & Brewster, 2000, p. 419).

Short-term expatriate assignments appear to have several appealing benefits for both the organization and the alternative expatriate. The largest benefits to an organization is lowered costs, because the move is for a shorter duration and does not typically involve moving furniture or family, (Tahvanainen, et al., 2005, p. 668). With shorter assignment times, short-term expatriates appear to have lowered the impact distance has had on key network contacts at the home office. This is something that has

been shown to cause traditional expatriates issues when they return to the home office as they have lost connections to former colleagues or managers while on assignment (Dickmann & Harris, 2005). Research also shows that short-term assignments are increasing in importance through additional use (Tahvanainen, et al., 2005) and are the assignment type most expected to increase in use by practitioners (Brookfield Global Relocation Services, 2010, p. 9; Collings, et al., 2007, p. 205).

This research is timely for several reasons. It highlights an underrepresented segment in the literature, the alternative expatriate. The research has impact in that it gives a voice to the alternative expatriates, which helps to inform organizations and other researchers through their stories. In addition, it is possible that the alternative expatriates will also learn more about themselves in the process.

Secondly, from an organizational perspective, my research guides organizational leaders as to the individual motivations for the alternative expatriate assignments. Perhaps, if organizations are able to provide the environment and skills that the alternative expatriates are most interested in, then they might be more successful in retaining the assignee upon their return.

### Organization of this Thesis

This paper is presented in a chapter format. Chapter one introduces and reviews the research on alternative expatriates. Chapter two provides a greater contextualization of the issues facing the global workforce in the twenty-first century by reviewing the related literature. Chapter three outlines the methodology used in the research, including the overarching method and the rationale for its use. Chapter three then explains in detail how the interview guide was designed, how interviews were

conducted and concludes with how the data were analyzed. Chapter four summarizes the findings from the research and uses the quotations provided by the participants to tell a story of their experiences. Chapter five draws the report to a close by summarizing the conclusions from the research gathered, identifying areas of importance and pointing to areas that have future research potential.

## CHAPTER 2: LITERATURE REVIEW

The use of international assignments (IA) by organizations has been steadily increasing for a long period of time. The global marketplace is a highly competitive one forcing organizations to examine every cost in their income statement. This chapter reviews the current state of IAs and the people who are involved in them. Focus is first placed upon traditional expatriate assignments (TEA) after which three key disadvantages associated with the use of the traditional assignment are outlined. The review then considers two particularly popular alternative expatriate assignments (AEA), including self-initiated expatriates (SIE) and short-term expatriates (STA), and outlines the current state of what we know about each. The chapter concludes by identifying the gaps in the alternative expatriate literature.

### International Assignments

While the topic of IAs and expatriates has experienced a lot of interest within the academic community for the past four decades, IAs are not actually a recent phenomenon. Organizations have been using international representatives for thousands of years, with written evidence provided in multiple sources, for example: the Bible's merchants e.g. Genesis 37:28; 1 Kings 10:15 (New International Version); to the ancient merchant classes of Egypt, Greece, Phoenicia, Rome, and India merchants (Toutain, 1968); and certainly the classic economic treatise – *The Wealth of Nations* particularly *Book III: Of the different Progress of Opulence in different Nations* (Smith, 1976). More recently with the creation of the corporation, expatriates (who were more than likely called 'merchants' at the time) were used in some of the oldest trading organizations in

the world, including: East India Company/British East India Company (1600); Dutch East India Company/Vereenig de Oost-Indische Compagnie (1602); and Canada's Hudsons Bay Company (1670) (Bown, 2009).

*Who are the international employees?*

Briscoe, Schuler & Claus (2009) have identified 20 differing types of international employees which includes the TEA. A few of the AEAs that have been rising in popularity include: the virtual expatriate; international commuters; and short-term assignments (pp. 167-169).

*Typical expatriate assignment definition*

Expatriates have been defined in the literature differently by many academics. Using the papers of Harris (1999) and Petrovic (2000) as the basis for establishing their definition, Mayerhofer, Hartmann, Michelitsch-Riedl et al. (2004) define the TEA as one where: "employee and family move to host country for a specified period of time - more than one year" (p. 1374). A second example, found that the TEA typically lasts between three and five years and involves the family moving to the foreign location with the expatriate (Collings, et al., 2007, p. 199).

For my research I have selected the following definition of expatriate:

"When Parent Company Nationals (PCNs) are transferred (posted/assigned /relocated) to another country, to work in a foreign subsidiary or other type of operation (such as a joint venture or alliance) of the Multinational Enterprise (MNE) for more than one year, they are generally referred to as expatriates or international assignees (IAs)" (Briscoe, et al., 2009, p. 165).

To the Briscoe, Schuler & Claus (2009) definition I would add the Collings, Scullion & Morley (2007) criteria involving the relocation of the expatriate's family (if a family exists). I have selected this addition because as it will be shown later in the literature review that STAs do not typically involve a family transfer with the expatriate.

*Who are the traditional expatriates?*

While the number of women have been increasing over the past several decades (Fitzgerald & Howe-Walsh, 2009), even recent studies show that IAs are typically dominated by white men (Kraimer, et al., 2009). A recent practitioner report highlighted that women TEAs had experienced a recent decline to 17% (from 20% in 2009), a level that has not been previously seen since 2001 (Brookfield Global Relocation Services, 2010, p. 22). Additionally, Suutari & Brewster (2000) find that women were more often involved in self-initiated foreign assignments (SFE) (Suutari & Brewster, 2000, p. 422). What this suggests to me is that women are considering alternatives to the TEA. The rationale offered for why women are less interested in the TEA includes reasons such as the rise of dual-career families, cultural gender sensitivity, and the lack of flexibility shown by human resources departments in MNCs (Fitzgerald & Howe-Walsh, 2009; Harvey & Moeller, 2009; Selmer, 2001; Tung, 1998).

A review of the literature supported that the ages of international employees is broad and varied, and is often tied to the purpose of the assignment. For instance in a study of SIE workers, younger workers were often found to be in roles that emphasized lower skills (Inkson, et al., 1997; Suutari & Brewster, 2000), while older workers were

found more often with higher education levels and in senior management roles (Suutari & Brewster, 2000).

The age group 30-39 years was identified as the largest group of expatriates in a 2000 study of 448 Finish engineering graduates having 52% representation for TEAs, and 41% representation for SIE assignments (Suutari & Brewster, 2000, p. 423). A second study of 494 German expatriates found the highest response to their survey occurred between the ages of 30-40 at 62% (Stahl, et al., 2002, p. 219). Finally, a 2009 study of 84 participants found that the expatriate participants had an average age of 43 years (Kraimer, et al., 2009, p. 33). These studies support that the majority of expatriates typically fall between the ages of 30-45 years.

*Why are traditional expatriates sent abroad by their organization?*

Edström and Galbraith (1977), in what is considered to be one of the seminal expatriate articles, offer three basic reasons for organizations using expatriates, including position fillers, management development, and organizational development (Edström & Galbraith, 1977). Briscoe, Schuler & Claus (2009) offer two major reasons for using expatriates including demand driven purposes and learning driven purposes (Briscoe, et al., 2009). Expatriates are also used to help develop and guide organizational network growth with the organization as well as externally, and are controlled through the use of different strategic means (Harzing, 2001). Using the expatriate as a means of control over the foreign location appears to be another extremely important reason for assignments (Collings, et al., 2007; Edström & Galbraith, 1977; Harris, 1999; Mayerhofer, Hartmann, Michelitsch-Riedl, et al., 2004; Millmore, Philip, Saunders, Thornhill, & Morrow, 2007). While authors have used different names or deepening the

categories, Edström and Galbraith's (1977) original three categories would appear to still serve the purposes of classifying why expatriates are sent abroad by their organizations.

*Why do traditional expatriates personally decide to go?*

There has been a plethora of literature written on how the careers of expatriates are shifting. Two key concepts emerged from my review of the literature including the concept of the protean career (Hall, 1996) and, even more so, on the concept of the boundaryless career (DeFillippi & Arthur, 1994; Eby, Butts, & Lockwood, 2003; Stahl, et al., 2002; Tams & Arthur, 2010; Tung, 1998). Both the protean and boundaryless careers continue to be written about some 15-17 years after their initial publication. A protean career has been defined as being: "The career of the 21st century will be protean, a career that is driven by the person, not the organization, and that will be reinvented by the person from time to time, as the person and the environment change" (Hall, 1996, p. 8). The boundaryless career has been defined as: "For individuals pursuing internal careers, one's work life may no longer be perceived as a progression of jobs within a single organization. Rather, individuals will move from one company to another to pursue the best opportunities for their professional development" (Stahl, et al., 2002, p. 217).

An individual's career partially defines who they are both in meaning, as well as contributors to society as may be evidenced by the following quote: "From a personal perspective, there are few things as important to us as our careers. Along with our close relationships and our families, our careers are what we judge our lives by" (Inkson & Arthur, 2001, p. 48).

Partially as a result of perceived past violations of the employment psychological contract that the individual has had with the organization (Haslberger & Brewster, 2009),



expatriates are beginning to rely more on self-development and move towards using the organization as a means to a career's end, or what is known as "careerism" (Rousseau, 1990, p. 392).

What these two concepts suggest is that the individual has begun to take much greater responsibility for their own career, and has learned when dealing with the organization that more equality in decision making is necessary in order to ensure a "win-win" for both the organization and the individual (Hall, 1996, p. 11). Individuals therefore are looking toward assignments as more than simply monetary exchanges (Richardson & Mallon, 2005) and more so as.... A review of literature supports that individuals are interested in travel and adventure (Inkson, et al., 1997), increasing their career capital (especially in career networks, new skills learned, and career progress – who/what/why) (Dickmann, et al., 2008), and wanting a personal challenge (Stahl, et al., 2002) all of which go beyond the typical financial reasons (Richardson & Mallon, 2005).

### Concerns with Expatriate Assignments

My review of the literature found three primary concerns involving TEAs: i) the high costs of expatriate assignments, ii) challenges of retaining expatriates, and iii) the increasing competition for talent. These issues are very relevant in explaining why organizations have been pursuing AEAs. What follows is a discussion of how these three primary concerns impact the organization in deciding whether to utilize TEAs for their assignments.

#### *Costs associated with EA*

Consistent, reliable empirical evidence on the average costs of expatriate assignments is almost non-existent. What cannot be in doubt, however, is that the costs

associated with TEAs are significant (eg. Baruch & Altman, 2002; Brookfield Global Relocation Services, 2009) and in a modern global economy with razor thin margins, organizations are attempting to minimize these costs. In my review of the literature it became clear that accurate figures on the costs for expatriate assignments are difficult to gather, and this is somewhat to be expected, given the variety of locations, firms, positions, and people involved.

My review of the literature has shown that much of the literature on costs could be considered to be older, and in need of updating. With regards to the direct costs of sending an expatriate abroad, the literature suggests direct costs in the range of three to four times an annual salary in Europe (Baruch & Altman, 2002; Zetlin, 1994). Putting a dollar figure onto the costs, research suggests that the annual direct costs associated with a TEA would range from between \$200,000 (Harvey & Moeller, 2009, p. 279), \$250,000 (Baruch & Altman, 2002, p. 239), and \$300,000 per year (Black & Gregersen, 1999, p. 53) on the low end to \$1,000,000 per year (Black & Gregersen, 1999) or more (Kraimer, et al., 2009; McNulty & Tharenou, 2004; Selmer, 2001; Stroh, et al., 1998) on the high end. A figure of \$1 million might not be avoidable for some TEAs once factors like relocation, housing, and schooling (Tahvanainen, et al., 2005) are factored in.

A major reason that academics are attempting to estimate costs is that organizations are continuing to struggle to determine what their return on investment is for their TEAs (McNulty & De Cieri, 2010; McNulty & Tharenou, 2004). There are definite academic proponents suggesting that firms must not only track their direct costs, but also strive to determine indirect costs associated with the failure of their expatriate assignments (Collings, et al., 2007; Harvey & Moeller, 2009; McNulty & De Cieri, 2010;

McNulty & Tharenou, 2004). Some indirect costs associated with failure include organizational cost (including lost business), loss in reputation and brand, and loss of intellectual capital when expatriates move to competitors upon their return (McNulty & De Cieri, 2010). The individual expatriates also face costs when assignments fail and include reputation damage, lost time in their career pathway, and both physical and psychological damages (McNulty & De Cieri, 2010).

A key strategy employed by many organizations is seeking cost reductions through changes to their labour (Pink, 2005). Organizations are achieving these cost cuttings through a reduction in TEAs and/or exploring the use of AEAs. For instance, in their 14<sup>th</sup> annual survey report of senior human resource professionals or managers of international relocation programmes (n=180), Brookfield Global Relocation Services (2009) indicate that the recent sharp economic slowdown has resulted in corporate cost cutting measures with 21% of participants surveyed indicated they had declined the number of IAs in the past year (p. 8). The cost-cutting focus has internationally based companies and organizations exploring cost savings through the use of AEAs (Starr, 2009).

#### *Retention of the Expatriate*

Similar to the findings on costs, a review of the literature on the retention of expatriates has shown mixed results, and while the area is of primary concern to both practitioners and academics, a crystal clear understanding of retention rates on IAs is not known. The literature does not have a clear idea on what constitutes a failure of an expatriate assignment (Harzing, 2002). One of the rationales given for failure is that

organization strategies do not focus appropriately on retaining the expatriate upon their return home.

Some of the reasons why traditional expatriates are looking to move outside their firms include not being able to use the new skills gained while assignment, expectations of an important job upon the return of the expatriate failing to materialize, and lack of organizational support upon their return (Kraimer, et al., 2009). In addition, several studies have shown that expatriates feel as though they do not have the opportunity to use their newly acquired skills upon their return to the home organization (Dickmann & Harris, 2005; Kraimer, et al., 2009). To address this issues, Stroh, et al. (1998) outline six means for organizations to maximize their odds of retaining their expatriates. These methods basically involve increased preview, disclosure, and communications around the expatriates position upon return, increasing management of the return by the company, and allowing the expatriate to use their learned skills upon their return (pp. 121-122).

#### *Increasing Competitive Pressures for Talent*

Another major challenge facing multinational organizations is the competitive forces impacting the demand and supply of the expatriates. Talent management and staffing have become popular topics in the expatriate literature over the past three to five years. At least two journals, International Human Resources Management (July, 2009) and the Journal of World Business (April, 2010) have featured dedicated issues to the topic. The following paragraphs contain points for discussion that were drawn from a recent article on talent management (Tarique & Schuler, 2010, pp. 126-128).

The first issue facing many organizations is the shift in demographics. Developed nations, such as Canada, are facing aging workforces that will see large losses of highly

qualified talent leaving as the older workers retire (Carroll, Weiner, Wilson, Ennis, & Henwood, 2010; Drummond, Beale, Kobly, Loiselle, & Miner, 2009). From my earlier review, it was identified that women are not entering the expatriate career stream as much as might be expected due in part to different career priorities (Fitzgerald & Howe-Walsh, 2009; Harvey & Moeller, 2009; Selmer, 2001; Tung, 1998). These demographical issues suggest a decreased labour pool from which talent can be recruited, particularly within the developed nation economies.

While world business has been a factor for thousands of years, there has been a rise in the globalization of companies (Friedman, 2005; Meyskens, Von Glinow, Werther, & Clarke, 2009). The increase in the number of firms competing for talent results in a reduced talent pool as organizations fight over limited talent resources. Influences for increased globalization include the rise in free trade zones such as has occurred in Europe (1992), North America (1994), and Asian Free Trade Area (1992) and international organization such as the World Trade Organization (WTO), the General Agreement on Tariffs and Trade (GATT), and the Group of Seven/Group of Twenty (G7/G20) national economic groups.

Also affecting the rise of globalization has been the increasing pressures placed upon cost reductions. This has resulted in a shifting of much of the manufacturing base from Europe and North America to the developing nations of the world. The off-shoring of human resources has gained in popularity among organizations, particularly during the mid-1990s and 2000s. While the off-shoring originally focused on low skills jobs, it has become increasingly focused upon moving higher skill jobs off-shore as well. As many of the developing nations around the world have been creating new organizations to

handle this influx of work, they have also been increasing their use of expatriate managers and representatives (Scullion, Collings, & Gunnigle, 2007), further increasing the demand for the expatriate talent pool.

The increasing importance of the global economy combined with the pressures to diversify a firm's income has also resulted in many small and medium enterprises (SME) entering the international markets (Morley & Heraty, 2004; Scullion, et al., 2007). While lacking many of the resources of their larger counterparts, SME's have been increasing their demand for expatriates, often focusing on the less experienced end of the talent pool. This increased demand reduces the available pool of talent, particularly the talent the organizations might have historically used as development into the next generation of expatriate managers.

The competition for talent has been felt because of several reasons chiefly shifting demographics, increased competitive pressures and pressures on organizations to control costs through their human resources practices. Organizations are becoming increasingly aware of the potential for alternative expatriate assignments as a way to increase the pool of available talent while also enjoying some of the cost benefits that can be associated with their use.

### Alternative Expatriate Assignments

The rationale for alternatives to the typical expatriate assignment has been primarily focused on three key areas, including reducing costs, increasing retention, and increasing the available talent pool for possible recruitment (Farndale, et al., 2010; Tahvanainen, et al., 2005). In the ever increasing move to cut costs, an interesting twist on the expatriate assignment has been in the use of virtual assignments where members

don't even leave the country but conduct their assignments and manage staff and resources in a online or 'virtual' space (Collings, et al., 2007).

Near the beginning of the chapter, I outlined that Briscoe, Schuler & Claus (2009) had identified 20 differing types of international employees. Given the multitude of alternative assignments to choose from, I have selected two assignment types to focus upon for my research. They are the self-initiated expatriate (SIE), and the short-term expatriate assignment (STA). These were selected for because of the popularity of these two expatriate types with organizations, the existence of at least a minimum base of literature on these two alternatives, and the availability of access I had to these two types of expatriates.

### *Self-Initiated Expatriates*

The earliest source of alternative expatriate assignments I reviewed was that of the SIE (Inkson, et al., 1997). While Inkson et al. (1997) discuss SIE, their primary focus is on the overseas experience (OE). The OE discussion featured a typically younger demographic who often take "the big OE" (p. 358) which was described as being an extremely popular experience, particularly in Australia and New Zealand.

The SIE has been defined as: "individuals who travel abroad to find their own work" (Fitzgerald & Howe-Walsh, 2009, pp. 158-159). To which another paper added "without organizational help" (Collings, et al., 2007, p. 204). My definition of the self-initiated expatriate combines the two definitions into one: "one who travels abroad to find their own work without organizational help; and who, if they take their family with them, are not compensated for the expense" (Collings, et al., 2007; Fitzgerald & Howe-Walsh, 2009).

With a more corporate focus, Vance (2005) updated and outlined a taxonomy for the SIE. Using a grounded-theory based methodology he explored how the expatriates prepared a foundation for working abroad, specific steps the expatriates took to build necessary skills that would gain employment, and finally how the expatriates were able to find their assignment (Vance, 2005, p. 378).

It was Suutari and Brewster (2000) that prepared what I believe is the best overview of the self-initiated assignment. Their survey was sent to 1,097 and was completed by 400 Finish workers, achieving one of the highest response rates I noted at approximately 40%. Some of the key demographical learnings Suutari and Brewster discussed were that SIEs were slightly younger and more popular with female assignees than traditional assignments, and that there were more spouses working during the assignment abroad. It was interesting to note that with regards to repatriation, the SIE often did not have a job to return home to and were more likely to remain abroad working for another firm, or continue with the existing firm (Suutari & Brewster, 2000). With regards to compensation, Suutari and Brewster found much variance among salaries which they attributed to the highly individualized negotiations. Additional premiums typically enjoyed by traditional expatriates (like housing and salary premiums) were rarer in the self-initiated assignments. Suutari & Brewster (2000) found a sub-category of self-initiated expatriate including those employed with non-governmental organizations (NGO) like the United Nations (UN), and the European Union Commission.

#### *Short-Term Expatriates*

Shen & Hall (2009) speak to the rise of the “Quasi-Expatriate” (p. 807) a rise in new alternatives to the TEA. STAs have been identified by practitioners as the most



likely alternative expatriate assignment to experience growth in the near future (Brookfield Global Relocation Services, 2010; Collings, et al., 2007).

To remain consistent with the literature both in regards to time (Mayerhofer, Hartmann, & Herbert, 2004; Mayerhofer, Hartmann, Michelitsch-Riedl, et al., 2004) and family location (Petrovic, 2000), I have use the earlier TEA definition to help refine the maximum time frame and family location during the assignment. I have selected the Collings et al. (2007) definition of the STAs: “an assignment longer than a business-trip but shorter than a year’s duration. Further, the assignee’s family often remains in the home country, while salary, pension, and social security benefits are also handled there” (p. 205). Critical in this definition is that the trip is longer than a short-term business trip which is identified as an international commuter or frequent flyer expatriate in the literature (Briscoe, et al., 2009; Haslberger & Brewster, 2009). Having the family remain in the home country is important in terms of cost savings to the organization, which is why it was included in the definition. Finally the remuneration is handled from the home country from which the STA originates which ties the short-term expatriate closer to the home organization. The literature suggests that short-term expatriates are most often utilized to transfer skills and knowledge, for management development purposes (Mayerhofer, Hartmann, Michelitsch-Riedl, et al., 2004), and for control purposes (Tahvanainen, et al., 2005, p. 665).

The advantages of short-term assignments include increased flexibility, simplicity, and cost-effectiveness (Tahvanainen, et al., 2005, pp. 667-668). Difficulties experienced by short-term expatriates include lack of consistent compensation, difficulties with tax planning, and lack of consistent HR policies (Mayerhofer, Hartmann,

Michelitsch-Riedl, et al., 2004). Additional negative outcomes of short-term expatriates area addictions, marriage problems, not building strong of relationships with local connections, and international paperwork like visas and permits (Tahvanainen, et al., 2005).

Compensation is an important component of the cost advantage offered by the short-term assignment. Compensation is often paid by the home organization, with short-term expatriates also receiving travelling expenses. Housing can range from a hotel to apartment or corporate housing depending on assignment length. A per diem is common on assignments along with a hardship bonus that may be paid in some extreme cases (Collings, et al., 2007, pp. 208-209; Tahvanainen, et al., 2005).

Short-term assignments suffer from less retention issues than TEAs (Tahvanainen, et al., 2005, p. 667). The assignments may appeal to more intrinsic factors desired by employees such as the need for interesting work and achieving goals (Mayerhofer, Hartmann, & Herbert, 2004, p. 651). Costs are often less than the typical expatriate because there are typically savings associated with moving a family, providing schooling, setting up a household (Tahvanainen, et al., 2005, p. 668). Short-term assignments are by their nature shorter than the traditional expatriate assignment which allows for the organization to better manage the metrics and planning of goals, making the management of the short-term assignments easier than the traditional expatriate assignments (Tahvanainen, et al., 2005, p. 668). An excellent source of comparison between TEAs against STAs can be found in Table 1 of Tahvanainen et al. (2005, p. 669).

### Career Capital Framework

Somewhere in the mid 1980s and early 1990s the human resources academics noted a shift in how employees, particularly those based in the US, were much more mobile in their careers and often experienced multiple employers over a lifetime (DeFillippi & Arthur, 1994). This gave rise to employee career concepts such as Hall's (1996) "the protean career" and DeFillippi & Arthurs' (1994) "boundaryless career".

The protean career focused upon the individual taking ownership of their career identities and stressed not only the monetary benefits associated with careers but a bundle of other indirect individual benefits resulting in higher job satisfaction and happier lives for the employees.

While I believe that Tung (1998) was the first to capitalize on moving the concept of "boundaryless career" into the expatriate literature, by reporting that expatriates perceived an IA as beneficial to their career, the concept was at least touched upon in earlier seminal expatriate literature on career management (Feldman & Thomas, 1992) and career mobility (Edström & Galbraith, 1977).

Merging these two concepts together creates a proposal that suggests that employees are becoming increasingly self-reliant in managing their own careers by focusing on outcomes that maximized their potential for career success. Inkson & Arthur (2001) provide a helpful investment analogy whereby the employee is viewed as a career capitalist, making career decisions similar to investment decisions. Given their limited resources of "time, energy, and skills" (p. 50), employees must invest where they perceive the greatest payback will accumulate (pp. 59-60).

The boundaryless career is concerned with employees maximizing the opportunities to create and gain competencies (DeFillippi & Arthur, 1994) or career capital (Dickmann & Harris, 2005) through their employers. Because of this pursuit, employees would be more likely to pursue work in other divisions or even organizations if necessary (Stahl, et al., 2002). It was in DeFillippi & Arthur's (1994) paper that the concept of three competencies, namely knowing why, knowing how, and knowing whom, were introduced. These competencies were envisioned as a way to align 'individual' employee competencies with those of the employer 'organization', moving both parties towards greater interdependence (p. 320). The three competencies and some of their impact in the expatriate literature are outlined in greater detail below. I will refer to the career competencies as career capital from this point forward, as much of my research is based upon a series of expatriate papers written by Dickmann and colleagues (Dickmann & Doherty, 2010; Dickmann, et al., 2008; Dickmann & Harris, 2005) who use this terminology.

### *Knowing How*

Knowing how represents an individual's knowledge and skills, or ability to 'know how' something is achieved (DeFillippi & Arthur, 1994). The individual accumulates this knowledge during the span of their careers through development, training and learning through doing (DeFillippi & Arthur, 1994). Dickmann and Doherty (2005) offer further that the individual's knowledge and skills are not solely explicit in nature, but are also gained through soft skills, implicit, and technical knowledge. Finally the individual's knowing how represents the ability of the expatriate, through knowledge and skills, to complete a job successfully (Haslberger & Brewster, 2009).

DeFillippi & Arthur (1994, p. 309) suggest that the knowledge and skills of an organization is represented by the accumulated individual knowledge that belongs to the organization's employees. Knowledge management systems can help organizations retain and codify the collective institutional knowledge belonging to its members, more specifically by the sharing of that knowledge between employee to employee (Briscoe, et al., 2009, p. 71). The evidence provided by Dickmann & Harris (2005) shows that organizations are developing the individuals' knowing how capital through the use of a career progression system (p. 403).

The knowing how career capital is thus represented by knowledge and skills. The emphasis in a boundaryless career context is that knowledge and skills are transportable by the individual between employers and viewed by employees as something that is continuously grown over their careers (Eby, et al., 2003, p. 692). The ability (knowing how) of an expatriate to successfully complete an assigned role should be viewed as a critical component of future research.

### *Knowing Whom*

Dickmann & Harris (2005) provide evidence that knowing whom is the most critical career capital component to individual expatriates because it is a form of capital that they believe has been lost while on their IA. Knowing whom or knowing who, from an individual perspective, represents a networked approach that consists of individual contacts that are both internal and external to the organization (Dickmann & Harris, 2005, p. 400). Knowing whom also exists at both a professional and social level and helps to contribute to the career success of the individual (Dickmann & Harris, 2005, p. 400). Eby, et al. (2003) expand upon the career path to include persons who would contribute

to the other two career capital areas of knowing how and knowing why. The resulting personal (knowing who) networks can result in areas such as new jobs, new learning opportunities, reputation enhancement, and other contacts (Eby, et al., 2003). DeFillippi & Arthur (1994) also speak to the role of family, friends, school mates, mentors, and others, who might be considered to be weak in their ties to the organization, can contribute significantly to the individual achieving career success such as by assisting in the search for new work.

Knowing whom, while important in the home office context before the IA, has been shown to be an area neglected by most of the organizations employing the expatriates interviewed by Dickmann & Harris (2005) who were left to develop their own plans while abroad. Being seen or exposed to higher level managers was recognized as being critical to being recognized and assisting in career success within the organization (Dickmann & Harris, 2005).

The knowing whom career capital represents a potential negative to the organization, particularly of the external source, in that those contacts are the ones who are often assisting in pursuing individual goals outside the goals of the organization (DeFillippi & Arthur, 1994). Literature presented earlier in this chapter showed that retention of the expatriate is a major concern to organizations (eg. Harzing, 2002; Kraimer, et al., 2009; Shen & Hall, 2009). Managing the repatriation and integration of expatriates back into the home organization is critical because the evidence has been shown were expatriates will consider alternative options if this stage is not managed well (Shen & Hall, 2009).

### *Knowing Why*

Knowing why provides the answers to what provides motivation or purpose behind an individual's career moves (Inkson & Arthur, 2001). In DeFillippi and Arthur's (1994) discussion on how knowing why impacts the individual they add that the knowing why is contributed to by an individual's values, beliefs, and identity. Dickmann & Harris (2005) add that by knowing why an individual can gain passion and energy to achieve their career pathway.

From an organizational perspective, knowing why is associated with a firm's culture (DeFillippi & Arthur, 1994). Knowing how has been shown to add to greater commitment, performance, and learning by expatriates who were aligned with the organizational culture (Dickmann & Harris, 2005). Eby, et al. (2003) discuss the potential for harm to the organization in that knowing why can contribute to an individual decoupling of their identity from that of their organizations. Shen & Hall (2009, p. 794) further suggest that: "...the stronger employees' ties are to their job and to the people, the organization, the community, and other factors associated with it—that is, the greater their job embeddedness—the more likely they are to remain in that job" (Shen & Hall, 2009, p. 794).

In their research, Dickmann & Harris (2005) noted that while organizations promoted that IAs were beneficial to the fast-tracking of the expatriates careers, two-thirds of the individuals' perceived that the IA had no impact organizationally. This suggests a misalignment between the organizational and the individual in knowing why an assignment is being undertaken. In an extensive mixed-methods review of why individuals were willing to accept assignments, the evidence showed a mismatch of

perceptions between the factors organizations believed were important to the expatriates and the factors actually valued by the traditional individual expatriates (Dickmann, et al., 2008). Dickmann, et al. (2008) conclude that the danger in mismatched knowing why perceptions could actually harm the very individuals that the organization was trying to assist. A situation where the organization and individual are not aligned, might actually result in a loss of expatriates upon repatriation because of the lack of job embeddedness (Shen & Hall, 2009). An interesting finding in the Dickmann, et al. (2008) research was that organizations appeared to be overemphasizing the monetary benefits to individuals, who were actually considering the ‘whole package’ including other potentially intrinsic factors (p. 734).

I believe that the career capital research outlined above, supports DeFillippi & Arthur’s (1994) goal of creating a useful framework for analyzing future research on boundaryless careers (pp. 320-321) and also provides evidence of the usefulness of the framework for research focused on the careers of expatriates (Dickmann & Harris, 2005).

### Gaps and Future Research

#### *Gaps*

Much of the expatriate literature has historically been based on management positions within the organization, often at the expense of other categories of employees who work temporarily abroad (Sparrow, 2007).

Regarding alternative expatriate assignments, the research that has been conducted on short-term assignments has been dominated by discussion and hypothetical pieces (eg. Collings, et al., 2007; Farndale, et al., 2010; Scullion, et al., 2007; Shen & Hall, 2009) or been organizationally focused using HR personnel or managers as the



majority in the sample (eg. Mayerhofer, Hartmann, Michelitsch-Riedl, et al., 2004; Tahvanainen, et al., 2005). There are deeper studies available in analyzing the SIE assignment (eg. Suutari & Brewster, 2000; Vance, 2005), but these are also organizationally focused using managers and HR personnel to provide opinions as to what they feel are the individual perspectives bringing the potential for bias to enter (Inkson, et al., 1997, p. 355).

### *Future Research*

No less than three papers were found calling for broad based additional qualitative research to be conducted on careers and expatriates. For instance, Halsberger & Brewster (2009) suggest that additional qualitative research is needed to provide the “rich detail” on the “subtleties and paradoxes of the expatriate assignment” (p. 391). Stahl, et al. (2002) while calling for both additional quantitative and qualitative research suggests the case studies and in-depth interviews would be helpful in exploring the implications of a boundaryless career on the expatriate. Eby, et al. (2003) suggests that in-depth qualitative research is necessary to explore how organizations impact the individual career across different industries.

In dealing specifically with AEAs, three papers called for additional research. Given the lower amount of literature that was found dealing with the career capital of alternative expatriates, this is not surprising as we attempt to make sense of the landscape prior to deeper empirical research. In a recent paper exploring AEAs, Shen & Hall (2009) call for in-depth qualitative interviews to provide context around the variables that impact individual: identity, careers, networks and skills. Richardson & Mallon (2005) recommend additional research on the self-direct expatriates, due to the lack of research

available and to further explore other areas. Finally calling for more research on short-term assignments, the variables that impact them, and why they are being used is (Collings, et al., 2007).

### Summary

The use of alternative expatriate assignments is increasing in organizations, particularly as firms look to trim costs, increase retention, and attract new workers to the international talent pool. The career capital literature, through its discussions around protean and boundaryless careers, has established that employees are increasingly interested in managing their own careers for their personal benefit. The majority of research conducted on alternative expatriate assignments has been organizationally focused or based upon HR or managers perceptions as to what the alternative expatriates desire.

Recent studies (Dickmann & Doherty, 2010; Dickmann, et al., 2008; Dickmann & Harris, 2005) have focused on the career capital perspective of the individual, however, they have been solely focused on the traditional expatriate assignment and not considered alternative expatriate assignments. To the best of my knowledge, the literature has not used the career capital framework on an individual basis in exploring the alternative expatriate assignment. Further research is necessary to explore the alternative expatriate to provide an accurate portrayal of their view of the assignment. This approach could inform future academic research on alternative expatriates and help to guide organizational policies to bring them into greater alignment with what specifically the alternative expatriate values from a career capital perspective.

## CHAPTER 3: METHODOLOGY

The Dickmann & Harris (2005) framework has been considered to be useful to analyze the traditional expatriate assignment from a career capital perspective. Considering what, how, and who are involved in increasing the expatriate's career capital has proven useful in assisting organizational human resources departments to better align policies that create the best outcomes for the organization. By valuing what is important to the individual, organizations can increase expatriate loyalty and retention and ensure that valuable knowledge gained by the expatriates is maintained within the organization. By accomplishing these tasks, organizations would expect to find cost savings, particularly around retraining, recruitment, and knowledge retention. This research looks to apply the DeFillippi & Arthur (1994) career capital framework to alternative expatriates (AEs), as Dickmann & Harris's (2005) have already done with traditional expatriate assignments. I have specifically focused my research on two of the most popular types of AEs, the short-term expatriate and the self-selecting expatriate.

### Theoretical Framework

#### *Framework Introduction*

Guided by a series of qualitative research based papers conducted by Dickmann and colleagues (Dickmann & Doherty, 2008, 2010; Dickmann, et al., 2008; Dickmann & Harris, 2005), I have reframed and expanded upon the DeFillippi & Arthur (1994) career capital theoretical framework and Larson (2004) dual dependency framework that was used in the first research project (Dickmann & Harris, 2005). A brief summary of these frameworks can be found on the following pages.

*Theoretical Framework – Knowing How, Knowing Whom, and Knowing Why*

The Dickmann & Harris (2005) research was primarily guided by a theoretical career capital framework which was first proposed in a paper written to explain the concept of boundaryless careers (DeFillippi & Arthur, 1994). DeFillippi & Arthur's (1994) original framework considered the career capital that an individual gained as they progressed through their careers. DeFillippi & Arthur (1994) hypothesized that individuals would value the creation of this capital whether that was with one firm or elsewhere as necessary. DeFillippi & Arthur (1994) suggest that career capital is gained in three categories representing: "i) know-why, ii) know-how, and iii) know-whom" (DeFillippi & Arthur, 1994, p. 308). This is valuable tool for researching the expatriate assignment because each assignment involves people (know-whom), the skills necessary to complete a task (know-how) and rationale or motivation of why an assignment was undertaken (know-why).

Both the career capital framework and the concept of the boundaryless career have been used by many traditional expatriate researchers to analyze the traditional expatriate assignment from a predominately personal viewpoint (eg. Cappellen & Janssens, 2005; Eby, et al., 2003; Hall, 1996; Sanchez, Spector, & Cooper, 2000; Stahl, et al., 2002). More recently, having been informed by the individual perspective, researchers have moved into a dual dependency or inter-dependence analysis considering both the organization and the individual perspective (Dickmann & Doherty, 2008, 2010; Dickmann, et al., 2008; Dickmann & Harris, 2005; Haslberger & Brewster, 2009; Wittig-Berman & Beutel, 2009). Early research often focused on the power of traditional

expatriate individuals to transport their learned skills (know how) to a firm they can best identify with a concept linked to job embeddedness (Shen & Hall, 2009) and so organizations were interested in learning about factors the traditional expatriate valued in an attempt to increase retention and gain an advantage in the hiring of these expatriates.

### *Theoretical Framework – Individual and Organizational Perspectives*

More recent research into traditional expatriate assignments has focused on the dual dependency relationship (Larsen, 2004) created between the expatriate as an individual, and the organization as an entity when completing international assignments. Dickmann & Harris (2005) added the additional layer upon the original DeFillippi & Arthur (1994) framework to examine the expatriate careers through a dual dependency lens (Larsen, 2004). Larsen (2004) suggests that organizations and individuals, within a global career context, depend upon each other. He continues stating: “The organization ‘sets the agenda’ due to its power as an employer with the rewards and sanctions related thereto, but the employee may resist, turn down or even veto an offer from the company” (Larsen, 2004, p. 861). Thus the organization and the individual must, as Tams & Arthur (2010) suggest, create an inter-dependence upon the other, with mutually beneficial outcomes for both. With research increasing on the dual dependency between the traditional expatriate and the organization, the potential for dual dependency also exists in the alternative expatriate assignment. Using Dickmann & Harris (2005) traditional expatriate career capital framework to analyze the alternative expatriate assignment could make this clearer to researchers.

Figure 1 outlines an adapted version of the Dickmann & Harris (2005) framework. This adaptation includes a copy of the classifications that I used when I initially coding the interviews.

Figure 1: Dual Dependency Career Capital Framework

	Knowledge, Skills, Abilities	Identity, Values, Interests	Intra-Firm, Inter-Firm, Professional, Social
KNOWING	HOW	WHY	WHO
Perspective	Knowing How	Knowing Why	Knowing Whom
Organization	Organizational Learning, Self Learning (Course), Observation, Doing	Task Assigned, Why Selected, Retention of Expat, Expat Skills Development, Expat Career Development, Client Needs	Home Boss, Foreign Boss, Senior Managers, Third Parties, Co-Workers Travellers, Co-Workers Home Office, Co-Workers Foreign Office, Mentor, Helpful Persons
Individual	Being seen, Organizational Learning, Self Learning (Course), Observation, Doing	Travel, Cultural Experiences, Career Capital Internal, Career Capital External, Interesting Work, Fear if Don't Go, Client Relationship, Helping, Job Responsibility, Learn New Skills, Age/Ability, Monetary Rewards, Altruism	Home Boss, Foreign Boss, Senior Managers, Third Parties, Co-Workers Travellers, Co-Workers Home Office, Co-Workers Foreign Office, Mentor, Helpful Persons, Socialization Network, Other Expatriates, Family

Adapted from Dickmann & Harris (2005, p.406)

The framework allows for a dual-dependency (Larsen, 2004) perspective of the three career capital categories found in DeFillippi & Arthur's (1994) framework. From the framework presented in Figure 1, you can see that: "knowing how" covers items that speak to knowledge, skills and abilities; "knowing why" covers the perspective

of identity, values, and interests; and “knowing whom” covers networks that are internal and external to the organization and which could be either professional, social or both.

## Research Framework

### *Research Purpose and Questions*

My research looks at the question of whether the Dickmann & Harris (2005) career capital framework can be applied to the AE assignment. The reason why the research is relevant is that the AE assignment is increasing in importance and organizations are under pressure to cut costs. The retention of expatriates and reduction of costs for expatriate assignments have been consistently identified in research, both in the academic community as well as by practitioners, as one of the main concerns for global organizations. By answering how assignments are valuable to the individual AEs from a career capital viewpoint, organizations should gain a better insight into that individual perspective. By then structuring assignments to reflect what is important to the assignee, a firm may be able to both increase retention through an increase in loyalty by the AE, and reduce costs through the use of these types of assignments.

### *Research Approach and Design*

The research design has taken the form of a qualitatively designed long-interview, based upon the McCracken (1988) book “The Long Interview.”

By using this multi-stage approach to the expatriate career, the experiences expressed by the participants, through the use of the long interview, might eventually be broadened through cultural themes that might include: i) naivety or altruism; ii) enjoyment or frustration; and iii) remorse or sarcasm.

A questionnaire was designed and featured many of the same questions (Dickmann, et al., 2008, pp. 750-751) asked in their research paper. As I am interesting in using the original framework to explore traditional versus alternative expatriate assignments, using one of the original instruments should be useful. A priori research was also utilized in the instrument design which led to a number of broader categories of questions that were not to be found in the Dickmann, et al. (2008) sample interview questions. Questions that I added dealt with popular topics found in the expatriate and alternative expatriate literature such as: organizational policies, organizational training, performance management, retention, and commitment.

Interviews of the alternative expatriates are continued until “theoretical saturation” (Glaser & Strauss, 1967) is achieved. McCracken (1988) suggests this may occur after approximately eight interviews, although it could be less or more depending on the research.

The research design is to apply Dickmann’s (2005) framework to the alternative expatriate experience. The research specifically looks at how the alternative expatriate manages their career capital. The use of in-depth long interviews is in the rich contextual data that flows out of the individual’s stories. It is from this rich data that themes and categories begin to emerge which can help tease out the alternative expatriate career capital perspective.

### Research Summary

To summarize, my research serves to fill a gap in the knowledge on alternative expatriate assignments by focusing on the individual perspective of two of the most popular alternative expatriate assignments, namely the short-term expatriate assignment



and the self-initiated expatriate assignment. By answering what is of primary importance to these alternative expatriates, I should be able to assist the organization in its design of its expatriate assignments. It is likely that the research may find some key differences between the typical expatriate assignment and the alternative. By understanding these differences, the organization may be able to increase retention, loyalty, and protect gains in knowledge that might be normally lost in the case of attrition by the alternative expatriate. The outcome to the organization could be potentially significant savings.

## CHAPTER 4: FINDINGS

Chapter 4 outlines my findings in the application of the Dickmann & Harris (2005) traditional expatriate career capital framework to the alternative expatriate assignment. The framework is applied and a comparison of findings has been undertaken under each of the three career capital themes used by Dickmann & Harris (2005), including knowing whom, knowing how, and knowing why. Through the use of this framework, I was able to explore more fully the benefits and cautions in using an alternative expatriate assignment over using a traditional expatriate assignment. This data helps to inform our knowledge about the alternative expatriate perspective of these assignments and the organizations use of them.

### Method

#### *Sampling Approach*

While the original research design called for the use of a snowball sampling technique by using the referrals of the participants to lead to other participants, I was only successful in obtaining one participant in this way. For the remaining participants, I used a convenience sample based upon networking within both my own and my supervisory professor's business and social networks.

Based on the participants who took part in the research, I am satisfied that a reasonably broad sample was obtained and based on the results of the data theoretical saturation was achieved in the majority of the thematic areas explored.

### *Data Collection*

Data was collected using a semi-structured interview questionnaire (Appendix A: Semi-Structured Interview Questions) that was designed using the long-interview method (McCracken, 1988) style of qualitative interview methodology. My interview design protocol was based on the work of Creswell (2007, pp. 132-134) and focused on: i) sampling; ii) style of interview; iii) recording procedures; iv) interview protocol; v) refining questions through use; vi) setting; vii) consent procedures; and viii) following the questionnaire. Interviews were conducted at a site convenient to the participant (three in Charlottetown; four in Moncton, New Brunswick; and one via Skype™ over the Internet.) in an area that was suited toward privacy and low interruption potential. Excluding one interview, the average interviews lasted approximately one hour and twelve minutes. The interviews ranged in length from 61 minutes to 114 minutes. The last interview was this long, due to unforeseen interruptions that occurred at the site.

### *Data Collected*

Data were collected using three primary recording sources. The researcher used an interview protocol (Creswell, 2007, p. 133) that included: i) a two page written consent form; ii) an eight page interview form; and iii) recorded the interviews using a digital audio recorder.

The participant read and then signed a consent form (Appendix B: Interview Consent Form) designed to: i) inform about the survey, ii) ensure the participant was aware of their rights to terminate the interview; iii) refuse to answer any question; and iv) take a break at any point without obligation or consequence.

While interviewing the participants, the researcher took field notes on his interview form based upon the questions contained in Appendix A: Semi-Structured Interview Questions. This was done to aid the researcher interpreting the subtle meanings of the participant's story and to better enable the coding of data thematically.

Finally, the interviews were recorded using a Panasonic™ RR US-490 digital audio recorder. The interviews were transcribed by the researcher personally using Microsoft Word™. The transcriptions were then imported into the NVivo 9.0™ software program for coding and data analysis.

The consent forms and interview forms were scanned using Adobe Acrobat™ to create digital versions. The audio recordings, transcribed notes, NVivo™ files, consent forms, and interview form data were then downloaded onto a finger print secured laptop computer which is kept in locked rooms when not in use. The paper versions of the forms are stored in a locked filing cabinet until the acceptance of this thesis, at which time they will be destroyed using a cross-cut shredder. The digital information will be backed onto two USB keys and stored in a locked filing cabinet for a period of seven years, as per the UPEI Research Ethics Board submission.

### *Analysis*

Data were analyzed using NVivo 9.0™ software using the thematic framework outlined in the methodology sections of this report (See Figure 1: Dual Dependency Career Capital Framework). I used the drag and drop method of coding that is a feature of the software. I identified 276 possible nodes (or themes). These aligned to the framework (129 nodes) as well as allowed the data to be analyzed based upon six

additional broad themes: i) perspective; ii) position; iii) how prepared; iv) people; v) background information; and vi) length of stay for a total of 147 additional nodes.

The codes used were refined during the coding process to better align with the findings that emerged from the data. The original framework, including definitions and codes, went through eight renditions of thematic and categorical coding consideration before the final themes emerged.

A significant part of the coding process was a calibration of the themes, codes, and keyword selection between my supervisory professor, Dr. Wendy R. Carroll, and I. We met consistently over several months to better refine the core of the analysis factors, themes, and coding that forms this research paper. This is consistent with the “*naturalistic paradigm*” design of qualitative research, described in the text “*Writing up Qualitative Research*” (Wolcott, 2009, p. 2).

## Results

### *Participants*

Following the recommendation of the text entitled “*The Long Interview*” (McCracken, 1988), I interviewed a number of participants until “theoretical saturation” was obtained (Glaser & Strauss, 1967). McCracken (1988) suggests saturation may occur around eight persons depending on the type of research being conducted. In many cases saturation was found around six participants, however, I interviewed eight participants.

The purpose of the research is to provide “rich detailed stories” (eg. Cappellen & Janssens, 2005; Dickmann & Doherty, 2008; Haslberger & Brewster, 2009) for the

researcher to provide context to the reader in order to assist them in clearly understanding the main protagonists in the stories being told.

The Canadian born alternative expatriates interviewed were of an average age of 32.50 years, were evenly divided among male and females, and were evenly split between self-initiated alternative expatriate assignments and short-term alternative expatriate assignments. Four of the participants are no longer working for their initial alternative expatriate organization and four remain with the original sending organization. The length of assignments ranged from less than three months to greater than twelve months; with a heavier weighting towards shorter assignment lengths.

A significant finding of the participant background analysis was the emergence of job role specifically as it related to the transfer of knowledge. This is expanded upon under the discussions of the knowing what and knowing why categories and can be used to help explain the importance of the foreign personnel (co-workers and boss) under the knowing whom category. At a truly macro level, the roles of the expatriate alternatives interviewed could be summed up to be one of advisor, coach, and/or teacher.

#### Validation of the Original Framework

A copy of the adapted Dickmann & Harris (2005) framework is presented in Table 1 on the following page, along with the original proposed coding categories that were based upon the several reviews of the interviews:

Table 1- Dickmann & Harris (2005) Career Capital Framework

	Knowledge, Skills, Abilities	Identity, Values, Interests	Intra-Firm, Inter-Firm, Professional, Social
KNOWING	HOW	WHY	WHO
Perspective	Knowing How	Knowing Why	Knowing Whom
Organization	Organizational Learning, Self Learning (Course), Observation, Doing	Task Assigned, Why Selected, Retention of Expat, Expat Skills Development, Expat Career Development, Client Needs	Home Boss, Foreign Boss, Senior Managers, Third Parties, Co-Workers Travellers, Co-Workers Home Office, Co-Workers Foreign Office, Mentor, Helpful Persons
Individual	Being seen, Organizational Learning, Self Learning (Course), Observation, Doing	Travel, Cultural Experiences, Career Capital Internal, Career Capital External, Interesting Work, Fear if Don't Go, Client Relationship, Helping, Job Responsibility, Learn New Skills, Age/Ability, Monetary Rewards, Altruism	Home Boss, Foreign Boss, Senior Managers, Third Parties, Co-Workers Travellers, Co-Workers Home Office, Co-Workers Foreign Office, Mentor, Helpful Persons, Socialization Network, Other Expatriates, Family

Adapted from Dickmann & Harris (2005, p.406, table 2)

Table 2 - Descriptive Statistics for Original Framework presented on the next page, highlights the results of my coding the categories to the knowing how, the knowing why, and the knowing whom themes proposed in the Dickmann & Harris (2005) paper. The weakest supported theme is the knowing how, particularly for organizations, although six interviews yielded results in the two subcategories and so could be considered to have reached saturation. The results suggest that the traditional career capital framework proposed by Dickmann & Harris (2005) has potential applicability for analyzing the alternative expatriate assignment.

Table 2 - Descriptive Statistics for Original Framework

	Knowing How	Knowing Why	Knowing Whom
<b>Individual</b>	8/59 Organizational Learning 7/23 Doing 5/13 Self Learning 5/11	8/530 Money 8/117 Age/Ability 8/51 Choice 8/41 New Skills 8/37 Travel 8/31 Interesting Work 8/31 Cultural Experiences 8/23 Job Responsibility 7/53 Career Capital - Internal 7/40 Career Capital - External 7/31 Happiness 7/31	8/250 Foreign Co-Workers 8/47 Family 8/29 Foreign Boss 8/25 Co-Workers Traveller 7/25 Social Network 7/23 Co-Workers Home 6/20
	6/43 Organizational Learning 6/31 Doing 6/10	8/180 Task Assigned 8/56 Why Selected 8/51 Transfer Knowledge 8/32	8/117 Foreign Co-Workers 8/28 Foreign Boss 6/20 Third Parties 5/17 Home Boss 5/11
<b>Organizational</b>			

Note: The first number given is the total number of interviews the theme was found in. The second number is the total number of quotes describing the theme found in the interviews. These results represent only the themes where saturation of the data was found.

### The Career Capital Framework

The volume of data analyzed (330 pages) was substantial, the number of themes and subthemes used to code the data using NVivo™ nodes and tree-coding (276 nodes), and the framework selected (representing 6 themes by two perspectives) made for a very robust model. What follows is an explanation at a more micro level, organized first by the three Dickmann & Harris (2005) themes used and broken down by the perspective. In each theme, I summarize the key similarities and differences, and in the conclusions found in Chapter 5, I will then provide an overarching summary of the key findings.



### Knowing Whom

The research of Dickmann & Harris (2005) found that for individuals, the knowing whom theme was emphasized the most, above all of the other career capital themes as a source of career capital loss. In contrast to Dickmann & Harris' findings (2005), my evidence provided that the knowing whom theme was robust among the alternative expatriates (AE) interviewed. What follows is an explanation and analysis of both the organizational and individual perspectives from the typical expatriate assignment versus my findings which represent the experience of the AE.

#### *Typical Expatriate Assignment – Knowing Whom*

Dickmann & Harris (2005) had two key knowing whom findings emerge from their research. First, and most significant, was that the expatriate often experienced a loss in their knowing whom social career capital (Dickmann & Harris, 2005, p. 404). In explaining this loss, Dickmann & Harris (2005) emphasized the expatriate's knowing whom career capital was reduced primarily through the loss of contact with the home office. The loss was viewed by the expatriates as affecting both their relationships with their local colleagues and more often importantly with the senior management of the organization.

The second finding by Dickmann & Harris (2005) was that, while the organization featured programs and policies to support the growth of the knowing whom capital at the home office, there was a complete lack of similar programs while on international assignment. The expatriate was basically left to manage their own network.

*Alternative Expatriate Assignment – Knowing Whom*

My research found that the both the individual and organization involved in an AEA placed the majority of their knowing whom career capital emphasis upon the foreign co-workers and the foreign boss. None of the participants spoke of a loss in capital the way that Dickmann & Harris's (2005) did. The question comes to mind is: Why doesn't the home office play a more important role to those interviewed? This can be explained by understanding that my participants, who self-selected to work abroad, did not have a home office to return to.

Particularly, for the short-term assignment participants, the foreign co-workers represented their reason for being abroad due to the focus on the training, retraining, and coaching of these foreign co-workers. The impact the foreign co-workers had on the short-term expatriate, thus, could represent a measure of the expatriate's success abroad. For instance in this quote, Elizabeth speaks as to how her trainees are involved in the rating of her abilities:

*“On training, yep, for launch, right. We had a specific hard date of when we needed everyone trained on the phones, so hitting those timelines... Um... I mean, there was, I guess, learning verifications for the agents on my ability to train and how they grasped the knowledge. They did a... um... [branch office] did a kind of like a yearly, I guess it would be a three month review, on my performance feedback, changes I should make, stuff like that so I could take it home with me.” (Elizabeth, Multiple Assignments)*

Elizabeth's comment highlights how her career could be impacted through feedback provided by the foreign workers when the organization led their performance reviews. Elizabeth's suggestion contrasts with Dickmann & Harris's (2005) traditional expatriate findings which suggest that it is the home office influence upon the traditional expatriate's knowing whom career capital that the traditional expatriate is most concerned

about. Dickmann & Harris (Dickmann & Harris, 2005) suggested that for the traditional expatriate, the foreign coworkers represented an opportunity to socialize and expand the individual's global network, which they used in a bid to gain further career opportunities.

Even though some of the expatriates were away from home for short-term assignments, the length of time was significant enough that they expressed the difficulties of being apart from loved ones. In the quote below, Kyle speaks of how he misses the 'important' things from his life at home, which spoke to me of the sacrifice he was making to undertake the assignment:

*"Just in general, um, being away for so long... 'cause it's really difficult, um, from a personal perspective. I just bought a house; my girlfriend just started her post-secondary education... so there was a lot of a lot of things to leave behind that I really felt I should be here for." (Kyle, Asia)*

Because Dickmann & Harris's (2005) research focused on the traditional expatriate, leaving behind the family was not a concern to his participants. This represented a major difference between the traditional expatriate assignment and the short-term expatriate assignment, as the short-term expatriate did not have their family with them while they were abroad. For the self-initiated expatriates I interviewed, there was a divide between those who travelled with their families, and those who did not. The self-initiated expatriates who did not travel with their families reported feeling similar as the short-term expatriates reported.

In my research, I found that foreign co-workers and fellow travelers quite often acted as a proxy for the AE's social network abroad acting as a social bridge those missing home friends and family. One example of how fellow travelers helped to provide home supports while on the foreign assignment is provided below where Bethany speaks

quite passionately about how her experience in sharing Thanksgiving abroad with her fellow travelers:

*“Thanksgiving dinner...so we still got to have a Canadian type Thanksgiving dinner... Yeah, yeah... the lady who made it for him, ‘cause it wasn’t him... him and his partner... his partner was away and so they hadn’t had time to do it... but their best friend had done it and he... um, a friend of his from Australia, a lady from Australia... made the turkey. It was amazing. It was amazing, though, ‘cause we all thought we were going to miss Thanksgiving, and of course, being in [city], they don’t celebrate Thanksgiving, like we do. Um, unless you find people from Canada or the US or somewhere that celebrates it, you’re really not going to be able to celebrate it. It’s not like you could go buy a turkey at the local grocery market right... But the lady that came from Australia she knew, they knew where to go to an Americanized market and they got a Butterball turkey. Yeah it was great. [Interviewer: Um, it’d make you feel like home?] It really did, it really did. It’s tough to be away from home on a holiday, sometimes.” (Bethany, Philippines)*

Dickmann & Harris (2005) had similar findings in that his participants used their foreign contacts to build social networks to expand their career capital opportunities. My participants, however, spoke of the foreign workers and expatriates abroad from a purely social aspect versus network building. I also found it interesting that while many of the participants spoke quite fondly of the friendships made abroad, not a single participant spoke of any long-term friendships created.

For many, the foreign co-workers or senior expatriates abroad were seen as sources of knowledge and learning for the participants. In this selection, Stuart talks about how learning is a two-way street, in that both the expatriate and foreign co-workers learn from each other:

*“I think all managers they learn from other managers and they always pick up things. So they learn from us, we learn from them... on how they do things and what works and what doesn’t ....” (Stuart, Asia)*

While not specifically spoken of under the Dickmann & Harris (2005) knowing whom category, the participants from their study emphasized that the majority of learning that took place abroad occurred through informal means versus formal organization methods. This would be the informal type of learning Stuart is speaking about and that it occurred through his interactions with the foreign co-workers, expatriates, and managers.

Unlike Dickmann & Harris's (2005) finding of the importance of the home boss and home network, for my participants the foreign boss most often represented a hurdle or impediment in the undertaking of their assignment. For example, Julie explains how her boss's actions and indifference to the local workforce seriously impacted the enjoyment of her work and being abroad, at least while that boss was in his position:

*"I found that to be a failure on [organization name]'s part, I was angry at [organization name] when I came home. I... hmm... my Canadian boss my first year I was with [organization name] was, um, very anti-female and would sign my name to things that I hadn't written. And he was kind of even very 'the natives are stupid'- type of attitude... which a lot of people overseas have - that the local people don't know anything and I'm a font of all knowledge. And he was employed by [organization name] as an employee. And he would make up these job descriptions and sign my name to them as if I had written them and it would make me nauseous. Like, I was so embarrassed to have my name on that kind of thing... and he... he came overseas as a volunteer and a [organization name] employee left and then he got hired to fill that position. And just some of the things that came out of his mouth. <she gives an interpretation of her boss> And 'the teaching the little women in the little villages how to wash their hands'. Oh, sorry, Peace Corps went in and did that 50 years ago. That's over and done with, these women want real skills."*  
(Julie, Multiple Assignments)

This example from Julie highlights a deep frustration and even anger caused by working with her foreign boss. Foreign bosses were mentioned by several of the participants as being not helpful to completing the task assigned. Some alternative expatriates, like Kyle, speak of feeling as though the foreign boss perceived them as a

threat and acted in an indifferent and unsupportive way, emphasizing the fact that the AE felt abandoned, and for all intents and purposes, left to fend for themselves:

*“.....when I was over there, I thought I would be reporting to a site director who would have some clear goals and set some expectations for me. But it was more ‘here’s what you need to accomplish...that’s the last time I’m going to be talking to you for you know two months. Go ahead and make it happen’.” (Kyle, Asia)*

There was not any evidence on this type of foreign boss interference or impediment mentioned in the Dickmann & Harris (2005) literature. Further research should be undertaken to explore the possibility of the AE being perceived as a threat to a foreign boss, especially for those sent abroad to provide training to the manager’s employees.

From my research, in terms of organizational policies, there emerged a small divide in how the organizations supported the growth of this capital. While the alternative expatriates working with NGO organizations indicated they received more social support than the other alternative expatriates received in the other organization forms, all had a minimum level of programming in place to ensure that the individuals knew at least whom they would be working with during their assignments. Non-governmental organizations, such as Julie’s, made the socialization and interaction between internal and external expatriates a priority.

*“And we did try to organize regular Friday night beer and pizza get-togethers with not just the Canadian volunteers but also the [other organization] ... which at that time were mainly from the UK, the Australian, the New Zealand, the Japanese and American volunteers. Umm, everybody paid for their own tab when we were out but... it was usually three of our organizations we shared office accommodations... and whoever thought to send the email out to all the volunteers Friday morning... is who organized it... coordination of it. Ah, we would have an annual... we’d have an AGM each year ...that’s why it’s an annual meeting... and,*

*um, that was always nice. It would be at a resort with nice food, people from off-Island would have accommodation. The people who lived on the Island where the meeting was taking place, they would stay at their own home but we would cover their taxi fares back and forth... and that kind of thing. And we always made sure there was entertainment. Like, some time one year almost everybody scuba-dived so we arranged to go out on a scuba and we've done snorkeling, or just beach walking. Or one time there was like a South Pacific Pop Music Festival... so we all went to that as a group... so, yeah, just kind of to unwind and... and have some fun." (Julie, Multiple Assignments)*

NGO's also ensured that the expatriates were prepared to handle interactions with local placements and governments and provide cultural and language training, typically offered through either other experienced AEs or from foreign citizens. The private firms, while light on local process and cultural training, arranged for social time, special trips, or shopping excursions for the expatriates such as Bethany describes below:

*"So the [organization name] located in [city], um, did set up one. The first time I was there, I went to [place], which is an Island that's very similar to Hawaii but small with blue water and white sand. And then the second time we went, because of the flood, we, the only thing I think was the shopping trip. We did a huge shopping trip, 'cause shopping is huge there." (Bethany, Philippines)*

The private firms, however, appeared to place a much higher emphasis upon the internal network development. They focused on the network between the expatriate and other internal expatriates and foreign co-workers. My private firm finding was consistent with the findings of Dickmann & Harris (2005) who provided evidence that organizations placed a very low priority upon growing the TEA's social capital focusing more on the knowing how theme.

### *Summary*

In conclusion, the findings from the AEAs support a greater emphasis on the foreign knowing whom type of career capital versus the typical expatriates' preference for localized knowing whom capital (Dickmann & Harris, 2005).

For private firms, there appeared to be limited benefits gained by the organization for the increase in this type of social career capital by the AE other than to facilitate a successful assignment. This could be as a result of the roles my participants were involved in: training, coaching and teaching assignments. Perhaps if the AE was more focused on organizational development reasons (DeFillippi & Arthur, 1994) the organizations might pay greater attention. The organizational de-emphasis on knowing whom career capital shown in the research of Dickmann & Harris (2005) in TEAs, creates doubt.

As individuals, the participants are using the foreign co-workers and fellow travelers to improve upon their own skills and knowledge; and to act as a substitute for their home social networks. Further research is necessary to explore the role of the foreign boss in the AE assignment; especially to determine their perspective on how they view their role, and the role of the AE who are assigned working for or with them. For the STA, perhaps the participants appear to place a lower priority on the home organization knowing whom career capital because of the shorter time period spent aboard.

### *Knowing Why*

Dickmann & Harris (2005) suggest that knowing why grows more important to the traditional expatriate the longer they are abroad. They found that traditional



expatriates desired to work abroad, they sought out challenges, and that some experience changes in their organizational loyalty and values as a result of their assignments abroad. Organizational leaders, they suggest, have substantial reasons for knowing why they are sending their expatriates abroad and believed that international assignments benefitted the traditional expatriate by fast-tracking their career (Dickmann & Harris, 2005, p. 405).

Out of all of the themes I analyzed, the knowing why theme yielded the greatest overall number of thematic codings across both the organizational and individual perspectives.

#### *Typical Expatriate Assignment – Knowing How*

Building on the earlier learnings from the 2005 paper (Dickmann & Harris, 2005), Dickmann then collaborated with Noeleen Doherty, Timothy Mills, and Chris Brewster in a 2008 paper entitled “*Why do they go? Individual and corporate perspectives on the factors influencing the decision to accept an international assignment*” (Dickmann, et al., 2008). This paper focused solely upon the topic of knowing why and explored, using a mixed-methods study, 28 reasons why expatriates choose to accept an assignment and then compared those results against the beliefs of Human Resources (HR) managers on the perceived importance of those items to the expatriates.

The study was significant in that it became clear that there were “mismatched perceptions” (Dickmann, et al., 2008, p. 748) between the traditional expatriates and the companies that hire them. The paper found that while the organization’s leaders believed that traditional expatriates were preoccupied with the financial package as the motivational driver to encourage them to choose the assignment; the individuals were actually predominately focused on three factors when choosing to work: life-style, career,

and developmental factors (Dickmann, et al., 2008, p. 748). Dickmann et al. (2008) concluded that their findings challenge the conventional thinking on traditional expatriates which believes that they are primarily motivated by financial considerations.

Similarly in their earlier 2005 study, Dickmann & Harris identified a mismatch in traditional expatriate and organizational leader perceptions for the career capital category knowing why. Beside the impact of organizational culture and fit, organizations focused strongly on promoting the assignment to the traditional expatriates as having a positive influence on their internal organizational careers (Dickmann & Harris, 2005). The traditional expatriates noted, however, that they did not see this positive impact on their internal organization careers and instead viewed the international assignment as building their personal skills, which in turn made them more valuable to potential competitors by increasing their career capital (Dickmann & Harris, 2005, p. 405).

#### *Alternative Expatriate Assignment – Knowing How*

In my study, I found that out of 15 reasons explored, there were 11 substantive (within at least seven interviews) factors influencing why alternative expatriates individuals accept or choose assignments abroad. These factors are: money or financial benefits, age and ability, choice, new skills, travel, interesting work, cultural experiences, job responsibility (or obligation), career capital – internal, career capital – external, and happiness. Of all the themes explored, the alternative expatriate participants provided the greatest detail in their interviews as to knowing why they wanted to work abroad.

### *Money & Job Responsibility*

Money was a significant category in most of my interviews, but featured both positive and negative comments by the alternative expatriates I interviewed. Some participants, such as Elizabeth didn't think twice in suggesting:

*"Money. That's it. (laughs) [Interviewer: That's completely it?] Yep! It's all about money right now for me." (Elizabeth, Multiple Locations)*

Other participants, such as Stan, placed greater value on either the work they wanted to do, or the company they wanted to work for, over an increase in money:

*"No the... probably, probably not money if they offered me a lot more money and I'd be doing less of the type of work that I'd want to do I wouldn't go." (Stan, Multiple Locations)*

Traditional expatriates are usually highly compensated to provide motivation for working abroad (Collings, et al., 2007; Mayerhofer, Hartmann, Michelitsch-Riedl, et al., 2004; Shen & Hall, 2009), and while the alternative expatriates stated that money played a highly important role, only one person interviewed received an additional bonus for the completion of his work assignment (and even more interesting, it was Stan, who said he least valued the money). The remaining participants did not report receiving any additional compensation for working abroad outside of a per diem that covered meals, some form of housing, and travel related expenses. These findings are consistent with Dickmann et al. (2008) traditional expatriate findings, that suggest that individuals do not necessarily completely focus on money, although the findings differ from Dickmann et al.'s (2008) findings that the organizations do focus on the financial aspects. My research clearly showed that the organizations did not compensate extra for working abroad.

### *Age & Ability*

Age and ability to work abroad has definitely been shown to influence the traditional expatriate in a variety of means identified in a review of literature by Dickmann et al. (2008) highlighting reasons affecting the ability to work abroad that included flexibility, family related concerns, and age. Examples of age influencing the decision to go emerged from the interviews that I undertook of the alternative expatriates. In this first quote, Charles, a self-initiated expatriate, speaks of how the offer to work abroad appealed to his sense of excitement:

*“At the time I was 29 ah I was single and it ah, it sounded like a pretty exciting proposition.” (Charles, England)*

Charles also qualifies his statement by drawing attention to his age and marital status at the time of being asked to work abroad, implying that there wasn't anything holding him back. Later on in the interview he speaks of how his fellow Canadian expatriates have decided to go back home for 'perfectly good reasons':

*“...I mean most of the Canadians I've met here that have gone back have gone back for you know for perfectly good reasons just you know they wanted to get back to Canada or you know kind of did their 4-5 years their 10 years or just kind of like had done what they wanted to do or family circumstances or work circumstances that they just wanted to move back to Canada.” (Charles, England)*

Charles' comments draw attention to the potential for a career cycle among alternative expatriates. In his quote, he suggests there comes a time for those who choose to work abroad, to return home to raise a family, or even that the alternative expatriates had completed their foreign experiences and it was time to return home to reintegrate back into their homeland culture. My findings appear to support the literature on the boundaryless and protean careers (DeFillippi & Arthur, 1994; Hall, 1996) which suggest

that the traditional expatriate values experiences above their individual jobs and extrinsic factors in valuing some very intrinsic factors such as the need for travel/adventure, family, and life change (Dickmann, et al., 2008, p. 733; Richardson & Mallon, 2005, p. 412). Charles' suggestion that the ability to work abroad was support by a short-term assignee, Elizabeth who also draws attention to her lack of ties, holding her back from leaving on a whim in this quotation:

*"Just that I mean as far as this organization goes, I love it from a travel perspective, Like I'm single, you have not kids, you have no parents, er... like nothing holding me here, so I'm onboard for anything. Actually I was just ask to go to um, [foreign location] last week, on Friday. Can you leave on Sunday? Um... 'Sure!' Like they're that... you know what I mean... you have to be that flexible. It didn't end up working out... they didn't want me in the end. But yeah, it's Friday afternoon, 'Can you leave for [foreign location] on Monday night?' 'Absolutely let's go!' (laughs) So I mean, you never know when those are going to come around the corner. And you're going to be asked." (Elizabeth, Multiple)*

Elizabeth suggests in her quotation that her ability to travel makes her more likely to be asked to work abroad by her organization and implies that this would make her more valuable to the organization. Elizabeth's quote also highlights an important trend I noted in the interviews of the short-term expatriates, they were being asked to leave with very short periods of notice often just 24 hours, while others who had less experience working abroad were given a week or two to consider but also in being given a choice of whether to travel or not.

### *Choice*

Choice played another important part of how the individual alternative expatriate thinks about their jobs. Here Frank, self-initiated expatriate, highlights that it is the 'responsibility' of the alternative expatriate to find work that meets their career requirements:

*“Absolutely um I think when you find yourself in the situation that you know it doesn’t work for you and you realize that it’s not on the path to your goals and objectives and you find yourself unhappy with it you, you, need to take action and you are responsible.” (Frank, Korea)*

Franks quote highlights the importance of choice to the alternative expatriate particularly given their ‘own’ careers. The alternative expatriate considers that their careers are theirs to manage and when it no longer suits then it is often up to them to make the decision to look elsewhere. This was noted in several of the interviewees, like in Stuart’s interview, who is a short-term expatriate, as he speaks about the decision faced by an employee on whether to stay or leave an organization:

*“Um, and either way, you mean, it’s all personal preference at that point. Whether you want to stay or not, but I, you mean, I feel that those people, you mean, it’s a personal choice at that point, and I’m happy for them when they leave, um, you mean, I’m happy for them if they stay. (Stuart, Asia)*

This simply highlights the importance of choice as it involves the alternative expatriates’ career. While choice was not an emerging dominant theme in the Dickmann series of articles (Dickmann & Doherty, 2008, 2010; Dickmann, et al., 2008; Dickmann & Harris, 2005) it was implied in that there were motives for traditional expatriates in deciding on whether to ‘accept’ an assignment being offered. There is further evidence in the literature that choice plays an important role in organizations empowering career management strategies for the traditional expatriate (Feldman & Thomas, 1992).

### *New Skills*

Dickmann, et al. (2008) study spoke of several important skills related factors influencing the traditional expatriate’s decision to accept the assignment including the development of leadership skills (#3), potential for job skills development (#6), and having relevant job-related skills (#12). In the following example, Frank, who chose to

travel abroad, used the opportunity provided by an organization to see if a career in education was for him:

*“Absolutely yeah to be, to be a frank it was kind of a testing or a pilot, you know personally for me um having come from the science and kinesiology discipline to determine whether I wanted to get into education, and um to kind of test the waters in a um risk free and you know lucrative environment without a, committing to a, a, an education degree and going through that prior to determining whether I was a, a, good career path for me.” (Frank, Korea)*

Frank speaks of how the opportunity was ‘risk free’ and of not having to commit to a costly education degree to first learn if this was the right ‘career path’. This is a further example of how the alternative expatriate uses their boundaryless career as they choose the best opportunities that fit with their personal gain and development (DeFillippi & Arthur, 1994; Shen & Hall, 2009) similar to the way the traditional expatriates do. Elizabeth, a short-term expatriate, when asked what her ultimate career goal might be, provides a further example of career opportunism speaking of how the skills she has learned would enable her to successfully open her own business:

*“Um, I don’t know I just think the skills [referring to business skills learned on the job] that I’ve got here over, over, the last nine years could make me successful in doing that.” (Elizabeth, Multiple)*

These two quotes provide the context that alternative expatriates are using the opportunities given to the full potential in the acquisition of new and useful skills that have relevance in multiple career settings and increase their career capital.

### *Travel*

The literature on traditional expatriates speaks to the value expatriates place on the opportunity to travel and have adventure (eg. Inkson, et al., 1997; Mendenhall,

Dunbar, & Oddou, 1987; Osland, 1995). Alternative expatriates, such as Stuart, spoke of how the ability to travel far was, in fact, the real perk of the assignment:

*“Um, not really, no. Um, you mean, it’s there’s no um, I mean, you mean, I didn’t get a salary, you mean a bonus, or anything. For going, it was more of everything is taken care of while you were there, so I guess that’s a bonus. You mean, every aspect of your life is paid for while you’re overseas. So, you mean, at a certain point, you do save money, I guess. (laughs) But as far as perks, or anything like that, no. The, I think, the going was the perk. You mean, to be able to help and to be able to see other parts of the world, you mean, for basically free.” (Stuart, Asia)*

So while the alternative expatriate assignments, in the case of Stuart, do not typically receive any additional money for travelling abroad, they often do see the opportunity to travel as being an alternative perk of the assignment, or as Kyle suggests:

*“Um, as well a free trip across the world that’s... there’s, there’s nothing wrong... awfully wrong with that!” (Kyle, Asia)*

Kyle, similar to others interviewed, continued later in his interview to speak about the length of time involved in his travel:

*“Um, it’s a long flight. (Laughs) You mean, it’s a, it’s a extended flight. Um, they did take, very well, they did very well they took care of us well, um. You mean the [company] itself, you mean anything over five hours in a plane they, they go business class. So that was a bonus, I you mean you it was a thirteen hour flight so it would have been a long flight to be on a in coach.” (Kyle, Asia)*

Kyle’s organization recognized the impact that long flights had on their travelling employees, using business class flights on any air travel over five hours. There wasn’t much discussion in the literature about flight times other than a brief discussion on having consistent organizational policies and the use of business class for particular assignment types in the case of readiness for work or length of flight (eg. Collings, et al., 2007; Mayerhofer, Hartmann, Michelitsch-Riedl, et al., 2004).



*Interesting, Challenging & Meaningful Work*

Having work that was interesting, challenging, or meaningful was very important to almost every participant interviewed. Comments like Kyle's suggests that for those in a job for 10 years are likely going to be bored unless their company changes things often:

*"If you doing the same job for like 10 years unless there is a lot of change management within that job you're going to be bored."  
(Kyle, Asia)*

While Julie speaks of how her father was in one career for his whole lifetime, which afforded him job security and a pension:

*I think it's an interesting concept, my father was in the military for his whole career. And he joined when he was [age] and retired when he was hmm, [age]. And I think it's great, he's got a pension, I would love to have that type of security in my life. On the other hand, I think it would be mind-numbingly boring. Unless you're in an organization that's big enough to give you, to afford you the opportunity to try to new things, when you need to try new things." (Julie, Multiple)*

Yet Julie hedges on the long-term career unless there is the opportunity to try new things so she can avoid the 'inevitable' boredom that 'must be' involved in such careers.

Bethany adds to this, stressing that without an opportunity to learn, she would miss the exhilarating feeling caused by the 'feeling' of change:

*"I really do and I think that everybody, a change kind of gives you that initial [deep breath given for emphasis] like that reaction and I don't know if it's that reaction that I like, or that it's just I like to learn things new, and I find in a (industry name) there's a tons of opportunity for that." (Bethany, Philippines)*

In this final quote on the topic, Charles builds on the earlier comments provided suggesting that it is the responsibility of the alternative expatriate to move onto new jobs if they want to experience a new challenge in their career:

*"...they've had they've moved on to different jobs that's you know not because their Canadian but because that's the way the*

*company has gone or they want a new challenge.” (Charles, England)*

Dickmann et al.’s (2008) research on why traditional expatriates choose to work abroad found a significant difference between how the organization leader’s perceived traditional expatriates valued the challenge of working abroad (#17) than how the traditional expatriates actually did (#7). Similar to the findings on traditional expatriates, the responses offered in my alternative expatriate interviews suggested that they also placed a high importance on having challenging and interesting work.

### *Cultural Experiences*

Having cultural experiences, similar to the ability to travel abroad, was highly important to many of the alternative expatriate participants I interviewed. Many of these AEs, similar to Julie, chose to work abroad because of the opportunity to explore and learn new things about other cultures:

*“Is what appealed to me, um the ability to learn more about working with people of different culture and hopefully to learn, not completely learn a new language but to learn how to day to day function in another language.” (Julie, Multiple Assignments)*

But while cultural experiences were quite high on the list of priorities, several of the participants, like Elizabeth below, spoke of missing the comfort foods of home:

*“Having McDonald’s was great – you went in and had a Big Mac and it tasted like a Big Mac on [name] Street, it was great. I gained 15 pounds... The day I found a box of Kraft dinner in the [city] in the [city] supermarket, I’m like Perfect! I know what this tastes like (laughs).” (Elizabeth, Multiple Assignments)*

In what turned out to be at least a culinary cultural irony, the participants spoke of valuing new and interesting cultural experiences, yet they missed most the tastes of home, and a large number spoke of how they took advantage of McDonald’s and other familiar brands while abroad. Traditional expatriate literature speaks of the importance of a

cultural experience, specifically from the viewpoint of the challenges faced by expatriates in difficult foreign cultures (Dickmann, et al., 2008; Dickmann & Harris, 2005) as well as the need for adventure and travel specifically in this case, as it relates to the cultural experiences it offers (Haslberger & Brewster, 2009; Osland, 1995). Of the alternative expatriates I interviewed, all were from North America and most (seven of the eight interviewees) travelled to countries with significantly different cultural dimensions (Hofstede, 2003). The areas that the alternative expatriates travelled to were quite diverse and included locations in Africa and Asia, to regions with much lower Individualism cultural dimensions (Hofstede, 2003) than are typically found in Canada. Yet many of the alternative expatriates interviewed spoke of being excited and wanting experiences that were unique to those particular cultures.

### *Job Responsibility*

The participants also recognized that part of the reason for them going abroad was that it was part of their job responsibility to their employer. In this quote below, Frank suggests that it was because of the specific job he was offered, that he was able to go on the assignment:

*“What I was brought there to do was to teach English, and you know for better or worse I was able to do that in my opinion successfully.” (Frank, Korea)*

The short-term alternative expatriates in particular recognized that part of their role in the organization included the job responsibility of travelling abroad, from time-to-time to conduct training. Kyle, who was one of those short-term expatriates, interviewed highlights in this quotation, the fact that the organization simply expects you to do a job:

*“Um, in my opinion there’s no benefit or kudos to working 15 hours a day for 10 years. No thank you for that um, it’s an expectation. Um, is obviously you work until the job is done. But*

*there's if you have to come in on a holiday that's kind of the expectation it's not an ask it's a requirement. You work." (Kyle, Asia)*

Kyle draws out the fact that the organization does not ask, the alternative expatriate is expected to conform to the needs of the organization, implying that this is expected even if the alternative expatriate doesn't feel like it, for instance in the case of a 'holiday.' This job responsibility aspect came across quite strongly in the short-term assignees and appears, based upon my review of the literature, to be something more thought of by the individuals who are alternative expatriates than those in traditional expatriate roles. Dickmann et al. (2008) does not appear to provide that traditional expatriates are selecting to go abroad out of a job responsibility.

#### *Career Capital - Internal*

Even out of the motivations already offered for why alternative expatriates choose to travel abroad it is clear that they value the increase in career capital, particularly in areas such as increased skills that they are afforded through going on their assignments. The building of internal career capital was an item that came out mostly in the short-term assignment expatriates. Like Stuart, many spoke of the importance of being recognized by senior managers in the organization by doing a good job while on the short-term assignment:

*"...There's a lot of expectations that you, you mean, the hindrance is if you don't, if you don't um, fulfill what's asked, or if you're not effective, it can hinder you. Um, if you are effective it's a definite plus. Cause, you, you, mean you're getting your name out with very high level management people at that point." (Stuart, Asia)*

The importance of building a job and creating what I will call a career reputation is also highlighted hereby Elizabeth, another short-term expatriate:

*“Absolutely! I mean I want to set goals for myself, um, continue to grow with inside the company, always have a plan of what my next career step is going to be within the organization. And I guess do my job I mean expectations for my job make sure that I’m, I’m doing them to the best of my ability. And the better you are the more they know you (laughs). You just get recognition within the organization.” (Elizabeth, Multiple)*

Elizabeth hits on the importance of doing a good job, planning her career steps carefully, and making sure that her good works are recognized by the right people. This visibility and ‘being seen by the right people’ is highlighted in the traditional expatriate assignment literature (Dickmann & Harris, 2005). Being seen or exposed to higher level managers was recognized as being critical to being recognized and assisting in career success within the organization and this increased visibility was viewed by Dickmann & Harris’s (2005) traditional expatriates as being part of their responsibility. This suggests alignment between the alternative short-term expatriates and the longer term traditional expatriates.

#### *Career Capital - External*

From the interviews, the self-selected expatriates appeared to be much more focused on the creation of external capital creation. This could be as a result of career opportunism by always being on the lookout for new opportunities, such as Frank discusses here:

*“I did, I had quite a range over the years... I mean that, that lasted for about a year with this company... and then I did some contracts with colleges and universities teaching students. I also worked at a... at an Academy that was designed to bridge the gap between high school and university. So students that were looking to improve their... a lot of other subjects... but English being one of them in order to qualify for entrance into top tier universities. Um... I worked for private companies in a number of different industries from... um fashion. I worked for a fashion company with their executives, and I also worked with Samsung...*

*um their Liquid Crystal their SDI division with their top executives there.” (Frank, Korea)*

What Frank is describing is how he has turned his self-initiated, teaching English as a second language assignment, into several additional assignments each with increasing importance and ultimately involved several years working abroad in Korea. Others, such as Stan talk, about the struggle for understanding what is important to him as a career:

*“I guess maybe seeing career, I don’t know, I think more about life instead of career, more about the, the, entire me instead of just the work me. I mean right now I’m trying to figure out am, am, I doing what I want to be doing, do I need to make a shift. But I wonder if I am always thinking about that but I but I’m certainly thinking about it a lot right now.” (Stan, Multiple)*

Stan struggles to integrate his life and career in some way that creates meaning and purpose for him. Elizabeth continues to build where Stan having reached her conclusion that ultimately it is ‘all about her’ as she discusses here:

*“No I mean absolutely if you need to move organizations because that’s gonna help, help you personally... Absolutely... It’s all about you in the end.” (Elizabeth, Multiple)*

As was discussed at the opening of the internal career capital discussion, the alternative expatriates are very much concerned about building career capital to benefit their varied, personal career objectives. This shows some evidence of the use of the Dickmann & Harris (2005) traditional career capital framework. It appears that the alternative expatriates value the learning of new skills, the opportunities to broaden their personal experiences, and, ultimately, the enhancement of their careers though the use of the international assignments they take.

### *Happiness*

The final individual category achieving saturation was the importance of happiness to the alternative expatriates interviewed. This finding was surprising as there was not a specific question directed to the alternative expatriates on the subject of happiness. Their stories highlight the role happiness appears to play in their lives, and importantly in their careers. The following series of quotes show that the alternative expatriates view personal and career happiness as a journey and something worth pursuing. Stan speaks of striving to ‘find’ the things that make him happy in this quotation:

*“Choosing what it is I want to do and trying to strive to find or ensure that I’m doing the things that make me happy. Try for happiness in your career. So it’s my role to make sure that I’m doing something that I want to be doing each and every day.”*  
(Stan, Multiple Assignments)

Stan sees the pursuit of happiness as his own personal responsibility, something Frank builds upon in this next segment. In this quote, Frank also talks of the ‘pursuit’ of dreams and happiness:

*“I think it’s more acceptable today to actually pursue um happiness, pursue your dreams and um for better or worse. You know I’m of the opinion that that it’s a long life to live to go to work every day hating it so, you know just I think life’s about more than, than, your job yeah.”* (Frank, Korea)

Frank also speaks of the personal responsibility to find work that you love, but also about enjoying life outside of work. In this quotation, Bethany talks about how being able to use the skills she has acquired while abroad on her short-term assignment has brought happiness to her:

*“[On being able to use their skills and knowledge upon their return] It makes me happy, it, it makes me excited about my job. Just about the fact that you can, you can go to work every day,*

*and a job can be a job for a pay check , or a job can be a job for a career. And this is my career; this isn't a job for me. So, it makes me happy that those skills have been given to me to make me successful." (Bethany, Philippines)*

She includes what I believe is an important definitional highlight in that there is a difference between a job and a career. Her quote suggests that a job is just something where you collect a paycheck, while a career is more meaningful and purposeful. She closes her quote with an expression of gratitude to her organization for 'giving her' the skills that have made her 'successful.' The only reference to happiness I saw in the Dickmann et al. paper (2008) spoke to happiness in a quotation from an top management interviewee speaking of the importance being happy in both work and life (2008, p. 741).

Organizationally, the participants highlighted three key knowing why reasons: 1) task assigned, 2) why selected, and 3) transfer knowledge. These three items appeared to be closely related to one another. The alternative expatriates interviewed are selected and assigned a particular task, because of their prior knowledge or ability to handle the assigned task. In every single interview the task assigned ultimately was to transfer knowledge such as Charles speaks of:

*"Yeah I mean it was basically to do what I was doing in, in, Canada but to do it in the UK." (Charles, England)*

Charles was hired by his England based employer because he possessed a particular form of knowledge that the organization lacked. This was quite similar to the other self-initiated expatriates in that they were bringing knowledge to the host organization. The short-term expatriates played a similar role but in a different direction. For instance in the following quotation provided by Stuart he, speaks to how he was bringing expertise and knowledge from the home organization to the foreign operation:



*“To a, they were struggling in [a specific area]. And, um I had the experience, in [the specific area for a specific company] so I went over to train and um, help with the bringing it back to their goals and training managers on processes such as [specific process]....” (Stuart, Asia)*

So it appears that while both the self-initiated expatriate and the short-term expatriate are involved in the transference of knowledge, the direction the knowledge flows is different. In what he perceived to be an interesting twist of events, Stan spoke about being surprised at the ability to acquire knowledge from an area considered to still be “developing”, and return and apply it to his home country.

*“Yes you know one of the things that I found surprising was that a lot of the work that I did in countries that we felt weren’t developing countries, ended up doing back in Canada. Like water resource protection, or removal energy type studies, I recognized a lot of what I was doing was meant to be quote on quote development work outside of Canada and when I returned I recognized how much quote on quote development work there is to be done in Canada.” (Stan, Multiple)*

Finally another participant, Kyle, speaks of the importance of adopting a global standard across the organization, and how each office of the organization should operate the same globally without regard to its location:

*“Um, kind of how to follow we have something called the global [program name] at [company name] and it’s really kind of the bible on all of our core processes. So it was really to assimilate them to [company name]’s um global [program name]. Yeah, yeah exactly, exactly because it should be that when [client] steps into [home office] or the [global location], um of those different cultures within [company name] it should be the same they should be seeing the same processes, so.” (Kyle, Asia)*

What was particularly interesting was Kyle’s choice of the term ‘assimilation’ as the traditional expatriate literature speaks to some of the different purposes of assignments. The example used by Kyle appears to be a case of a form of control strategy

known as centralization (Edström & Galbraith, 1977) over which the foreign operation's training and operating procedures are the adoption of global standards.

### *Summary*

The knowing why theme was ultimately the richest source of findings across the themes I identified as emerging from the interviews. The knowing why theme appears to offer more support for monetary influence at the individual level of analyses than in the Dickmann, et.al. (2008) study. The stated findings, however conflict with the actual results with regards to money. Outside of one small bonus for completion of the assignment by a NGO organization, there was no evidence that the alternative expatriates interviewed gained additional income through their international assignments. This was similar in nature to Dickmann & Harris's (2005) findings of a traditional expatriate disconnect on career benefits whereby the organization touted their benefits, yet the traditional expatriate did not see the net benefits. Strong intrinsic factors appear to play an important part in both of our findings (Dickmann, et al., 2008; Dickmann & Harris, 2005).

My research showed evidence that the transfer of knowledge within the organization was the most significant reason why the participant was assigned to the task.

### Knowing How

Dickmann & Harris (2005) suggest that knowing how is the most significant category for the organization studied. Dickmann & Harris (2005) analyze their knowing how theme on both "what" learning (skill or knowledge) the traditional expatriate learned, and the method they used. For my research, however, I was focused solely on the method the individual used, or how they learned. Of all of thematic areas I analyzed,

the knowing how theme received the weakest support. The support in the findings was weak both at the individual and at the organizational level among the alternative expatriates (AE) interviewed.

The knowing how theme on an individual level achieved complete saturation in only one category - on the topic of organizational learning, where seven of the eight alternative expatriates spoke of formalized systems of organizational learning. Other weaker themes that emerged at the individual level were learning by doing and self-learning with fair strength being mentioned by only five of the eight alternative expatriates.

At the organization level, only two categories emerged from the data. These organizationally based categories were organizational learning and learning by doing, and each of these categories were discussed in six out of the eight alternative expatriate interviews.

#### *Typical Expatriate Assignment – Knowing How*

On an individual basis, Dickmann & Harris (2005) found that while the organizations stated that they were planning for their careers, the traditional expatriate found the organizational career system was not helpful, and so the individuals typically choose to ignore it. The individual traditional expatriate choose instead to focus on taking advantage of learning opportunities as they presented themselves (Dickmann & Doherty, 2008) through on-the-job learning and through undertaking the roles and job tasks (Dickmann & Harris, 2005). Dickmann & Harris (2005) found that from an organization perspective, the knowing how capabilities were developed through on-the-job experience (informal learning) rather than formalized organizational instruction. The

organization focused on developing a career progression system to build competencies among their traditional expatriates (Dickmann & Harris, 2005).

*Alternative Expatriate Assignment – Knowing How*

On an individual basis, I noted several participants, such as Bethany, who took personal initiative to learning new skills on her own initiative, outside of any organization system, with the goal of benefiting her career. I called this category of learning self-learning as it involved personal initiative. Bethany elaborates her reasons for becoming certified bilingual in the quotation below:

*“Um, yeah, actually, yeah I’m gonna, I’m taking a French course. Um, truly to become bilingual. Just cause I’m English only currently. I’m actually bilingual, but fully in the company’s eyes I am not bilingual till I have a certificate. And I can [do], French [work]. So I’m working towards that, right now, on my own. Completely outside of [company name]... It’s an asset.”  
(Bethany, Philippines)*

Bethany speaks of how her organization values the skill of bilingualism. While she has the ability, through prior life learning to be considered to be bilingual, the organization will not recognize that it until she achieves a certification. Bethany has taken the initiative and enrolled in this course, outside of her work in order to obtain the certification. She goes on to elaborate how she envisions this accreditation as being beneficial (asset) to her career.

Many of the participants spoke of how their organizations offered learning available through a formalized organizational system of classes. The alternative expatriates, such as Julie below, spoke of how appreciative they were to receive formalized organizational training paid for by her organization:

*“And it was really great that my employer paid and supported me in getting these skills. I, I, like that. And that skills, also don’t have to be in professions, sometimes you have to look at the*

*things that you've learned through the courses during your work.” (Julie, Multiple Assignments)*

The next section deals with how the alternative expatriate individuals have experienced what I have called learning by doing, or what Dickmann & Harris (Dickmann & Harris, 2005, p. 203) consider to be informal learning. A theme mentioned by the participants was that they were not being provided clear direction and guidance by their organization when they arrived at the foreign operation. Several of the alternative expatriates spoke of how the foreign location was unprepared for them

*“Um, other negatives... not... not really knowing what I was getting into, and not having a structured environment when I was there. So it was it was easily... easy to adapt, but when I was over there I thought I would be reporting to a site director who would have some clear goals and set some expectations for me. But it was more 'here's what you need to accomplish, that's the last time I'm going to be talking to you for you know two months... go ahead and make it happen!' ” (Kyle, Asia)*

Another issue highlighted by Kyle is that he had clear expectations about what the site director should be providing, assumedly based upon other experiences he had within the organization, yet this did not occur at the foreign location and he needed to adapt to the situation, which he said he found easy enough to do. I saw this as the organization requiring the alternative expatriate to learn through doing. Stuart highlights a similar experience of not clearly understanding what the issues were prior to undertaking his assignment:

*“A lot of the issues were more of um, were they... they could have been more prepared for us, I think. Um, I mean that's one of the struggles when they bring people in, I mean sometimes they're not always prepared. To, use us to our full effectiveness. They just kind of come in and say what... what do you want to do? Well, what do you need? I think that's the... one of the struggles. There's not, there's not an itinerary of what they expect or what they want. You have to play it by... ok you have to gauge it on your own there's not a plan been set out for you...to work with,*

*you. You kind of make up your own plan, then submit it to them, is what I... the biggest, the biggest thing that I found that was frustrating, that... I expect to go in and this is what I need from you and... and then me to add to it. But, a lot of it was our... us creating our own plans.”(Stuart, Asia)*

Stuart continues his thoughts below stating he felt that his time was wasted due to the lack of preparation, on the part of the foreign site director:

*“...Um, that was one of the big things is was, just we got there the first day and it and it wasn’t as organized as it could have been. We felt that we lost a day or two... Um, just to... you mean... preparation. There was no preparation for us once we got there.” (Stuart, Asia)*

Instead of being assisted by the foreign boss to become orientated to the issues on site, he was left on his own to “make it happen.” The alternative expatriates interviewed saw this learning by doing as being stressful by ‘causing struggles’, or being a ‘waste of valuable time’. It is possible that the alternative expatriates may have found these learning by doing experiences more stressful because of the limited time available to them due to the short-term nature of their assignments. This contrasts against the findings of Dickmann & Harris’s (2005, p. 403) in which traditional expatriates saw that being left to figure out a particularly challenging issue through informal learning (or as I have categorized, learning by doing) was seen by the traditional expatriates as a means for building self-confidence. The alternative expatriates I interviewed did not report feeling confidence by applying learning through doing while on their assignments, and I would suggest have implied the opposite.

At the organizational level, none of the categories achieved complete coding saturation across all eight interviews. Organizational learning discussed in six of the eight interviews was among the strongest findings for the organization just as it had been the case for the individual. In some organizations, the organizational learning was quite

sophisticated. In this instance, Stuart speaks of how his company provides a corporate university for training its managers:

*“Um, I think we use... we have a very strong training program here. We do, multiple, updates. We... we have... at our... our own online university. That all managers are required to do two... um, training sessions a month. And before you can become a manager, there’s about forty online training sessions. It’s basically you get a bachelor’s in business online...” (Stuart, Asia)*

The organizations were quite focused on the standardization of learning across the organization such as how the alternative expatriate Elizabeth speaks of:

*“Right... I... it’s all the same process, everyone learns the exact same thing so really, really, easy to adapt from that perspective.” (Elizabeth, Multiple Assignments)*

Dickmann and Harris (2005) are silent on the use of standardized learning within the organization, but speak of a career path tool, which they do not expand upon other than to state that it was found in an internal corporate document and featured pathway stages to the traditional expatriates’ career. Other sources in the literature have suggested that standardized corporate learning is part of a parochial corporate human resources system (Millmore, et al., 2007) and can be used as a means of controlling foreign branches (Edström & Galbraith, 1977).

Of all of my alternative expatriates it was only the two NGO alternative expatriates who spoke about how their organizations provided cultural training prior to their assignments. In this quotation, Julie explains how her organization has created an advantage through offering good cultural training to their alternative expatriates:

*“Yep. That’s a huge part of [organization name] is the cultural [training]. Making sure everybody had good cultural training... cause some of the... other organizations didn’t. And watching their volunteers flounder for... Everybody is going to have problems when they get there. Everybody is. But it can be the difference of, of a month or two settling in period versus a year.*

*And, if you're only there for a year, you've never really become effective." (Julie, Multiple Assignments)*

Julie's explains how her organization's volunteers are adjusted or 'settled' in a shorter timeframe versus the other organizations' alternative expatriates who she describes are left to 'flounder'. Julie appears to be suggesting a significant advantage to cultural training being provided in organizations, particularly when considering the limited time available during alternative assignments, yet only the two NGO alternative expatriates I interviewed described being offered cultural training in preparation for their international assignment. Dickmann & Harris (2005) speak about the traditional expatriate organization endeavors to creating global mindsets and global competencies, while Dickmann & Doherty (2010) highlight how in their study the traditional expatriate organization researched had placed a high importance upon creating managers with multiple country and multiple cultural experiences (2010, p. 316).

Similar to the individual alternative expatriate findings, the category of learning that emerged at the organization level was learning by doing. Through the actions involved in doing, the employees learned the systems and processes necessary to undertake the role. In this quotation below, Julie highlights the fact that her organization values learned by doing for its volunteers:

*"...the volunteers learn a lot more on the ground once they're there...." (Julie, Multiple Assignments)*

Julie suggests that the traditional expatriate volunteers learn more through action when their 'on the ground.' In a second example, Elizabeth speaks to how her organization attempts to create a training environment to mimic what actually occurs in the field:



*Training our biggest gap is having them transition from the training to production. So we try and simulate what production is going to be as much as much as we can in training. They're kind of like in la la land they come in. They take their lunch on the same time. You know, it's kind of a low key environment with... you only get to know the trainers so they're kind of in a nesting, in their own little bubble... but you don't really know how successful the training was until you apply it in production"*  
(Elizabeth, Multiple Assignments)

These two examples highlight learning through doing, the first being on location, as was the case with Julie, and the other is in a simulation meant to stimulate as close as possible to being involved the activity. But even with the simulation training, as Elizabeth continues, you won't know if you have been successful as a trainer until the knowledge is applied through doing the actual activity. Dickmann & Harris (2005) emphasized the knowing how through actual on-the-job training as one of the most important means of learning highlighted by both their individuals traditional expatriates and the organizations that hired them.

These previous quotations I believe highlight how much the individual alternative expatriates value learning opportunities and take the opportunities to learn when they arise. This is consistent with the Dickmann & Doherty (2008) findings of learning opportunism by the traditional expatriates.

Organizations should be aware that alternative expatriates may try to specifically targeting their learning opportunities to enhance their external career capital skill. What this means to the organization is that individual targets those skill sets that will enhance their ability to attract employment across the broadest range of employers. For instance in this quotation, Stuart mentions how his learning may be able to help him to find another job elsewhere:

*“Absolutely, I mean I could transition out of [the company] and, and work any type of job, I, you mean, the experience that we learn here can be translated into any business.” (Stuart, Asia)*

In the preceding quote, Stuart highlights that he perceives the skills he has learned while working for his the organization are valuable and capable of being transported into ‘any’ other business. Organizations are in a difficult situation in that they must balance the desire for continuous learning that their alternative expatriates demand along with protecting the organization from becoming a training ground for its competitors.

#### *Summary*

In summary, my interview participants provided evidence of three means of “*knowing how*.” They spoke most frequently of the organizational learning, but spoke also of learning through doing and of taking advantage of self-learning opportunities. Dickmann & Doherty (2005) emphasized learning through doing (on-the-job learning) at both the individual and organizational levels for the traditional expatriates, while my findings were more consistent with the alternative expatriates individuals valuing the more formalized organizational learning and not preferring the learning through doing which they perceived to be stressful and a waste of time. The alternative expatriate organizations saw the benefit to both learning by doing and formalized organizational learning. Further exploration of this theme should be considered to fully develop other modes of learning used by the alternative expatriates in knowing how they learning new skills.

### Summary of Career Capital Framework Findings

My research has found many circumstances where the alternative expatriate assignment is similar to the traditional expatriate assignment. Examples of similarities include the use of international assignments by both traditional expatriates and alternative expatriates for the development of career capital.

In terms of the career capital frameworks application to the alternative expatriate assignment, there were also some significant differences noted between the alternative expatriate assignment and the traditional expatriate assignment. The primary difference between the two assignment styles was the emphasis placed on the home network by Dickmann & Harris' (2005) individual traditional expatriates as critical to prevent a loss of career capital; whereas my alternative expatriate's emphasize the foreign network as being most crucial, and did not report a loss of knowing whom career capital in the interviews. This finding might be as a result of the shorter durations of the short-term expatriate assignments and the lack of a home network to which the self-initiated expatriates can associate.

The other significant finding was that Dickmann & Harris' (2005) organizations sent their traditional expatriates abroad for organizational culture, fit, and promotion of career purposes. In my research, I found that the alternative expatriate organizations most often sent the alternative expatriate abroad in order to transfer knowledge to the foreign operation. The alternative expatriates were selected because they had the knowledge and know how on how to transfer it to the foreign location.

Table 3 – Existing Framework Comparison: Typical versus Alternative

		Typical Expatriate Assignments	Alternatives to Expatriates
Individual	Who	HOME OFFICE <sup>1</sup>	FOREIGN OFFICE & SOCIAL SUPPORT
	Why	MOSTLY INTRINSIC FACTORS <sup>1 2</sup>	MIXTURE OF INTRINSIC AND EXTRINSIC FACTORS
	How	KNOWING THROUGH DOING <sup>1</sup>	ORGANIZATIONAL (Secondary: SELF LEARNING, KNOWING THROUGH DOING)
		Typical Expatriate Assignments	Alternatives to Expatriates
Organization	Who	LITTLE SUPPORT OFFERED <sup>1</sup>	FOREIGN CO-WORKERS
	Why	ORGANIZATIONAL CULTURE, FIT & PROMOTION OF CAREER <sup>1 2</sup>	TRANSFER KNOWLEDGE & COMPLETE TASK
	How	KNOWING THROUGH DOING <sup>1</sup>	ORGANIZATIONAL & KNOWING THROUGH DOING LEARNING

<sup>1</sup> Dickmann, M., & Harris, H. (2005). Developing career capital for global careers: The role of international assignments. *Journal of World Business*, 40 (4), 399-408. doi: 10.1016/j.jwb.2005.08.007

<sup>2</sup> Dickmann, M., Doherty, N., Mills, T., & Brewster, C. (2008). Why do they go? Individual and corporate perspectives on the factors influencing the decision to accept an international assignment. *International Journal of Human Resource Management*, 19 (4), 731-751.

I believe that my cursory analysis supports the use of the Dickmann & Harris's (2005) career capital framework to examine the alternative expatriate assignment. The use of the framework has identified several areas where alternative expatriate assignments are different from the traditional expatriate assignments.

## CHAPTER 5: DISCUSSION AND CONCLUSION

Through my review of the literature, I have shown the three primary reasons why organizations have been interested in increasing the use of alternative expatriate assignments as being reducing costs, increasing retention, and increasing the available talent pool for possible recruitment. In my research, I selected two of the most popular types of alternative assignments to focus my research, including the self-initiated expatriate and the short-term expatriate.

In studying careers in an international context, the research has been historically focused on the individual sent on a traditional expatriate assignment. The alternative expatriate literature has been primarily exploratory in nature or has focused on what the organization believes matters most to the employees sent on these assignments. My research has been designed to answer the question: Can the traditional expatriate career capital framework be used to analyze alternative expatriate assignments, and if so what are the similarities and differences between the two?

### Summary of Study Findings

By applying the Dickmann & Harris (2005) traditional expatriate career capital framework I have been able to show some of the similarities and differences between the traditional expatriate assignment and the alternative expatriate assignment. The following is an outline of the key similarities and differences and the implications for organizations planning future alternative expatriate assignments.

### *Knowing Whom*

My research found that the alternative expatriate's place a higher emphasis upon the foreign worker versus the typical expatriates' higher value on the home office (Dickmann & Harris, 2005) when it comes to the knowing whom type of career capital.

There are three reasons I attribute a higher emphasis on the foreign worker knowing how career capital from the short-term alternative expatriate perspective. For the short-term assignments, I suspect that the shorter time spent abroad may not impact the home organizations' memory of the expatriate. I further believe that the assignment may even be seen as a favor to the home office, causing increased visibility and, as a result, building career capital for the short-term assignee. The third reason attributed to my findings is the nature of the interactions the short-term expatriate has with their foreign workers and travelers. The short-term assignments of the alternative expatriates I interviewed all involved the transfer of knowledge or skills to foreign workers. Foreign workers and other expatriate travelers also served as temporary replacements for the home social networks that were missed by the short-term expatriates. These factors could all increase the tendency of the alternative expatriate to assign a greater importance to the foreign workers.

For the self-initiated expatriates, they are also involved in roles that involve transferring of knowledge and skills and socializing extensively with their foreign co-workers and other foreign travelers. However, there is an alternative reason proposed – there typically is not a home office involved or, at least, one to return to. As such, there is much less importance placed upon home office career capital because it doesn't necessarily exist for the self-initiated expatriate.

Similar to the Dickmann & Harris (2005) findings for the alternative expatriates interviewed, there appeared to be limited supports offered by the organization for increasing the knowing whom career capital. Organizations in my research provided primarily the opportunity to build social networks. My findings found that private firms valued more the internal socialization networks, while the non-governmental bodies included in my research built upon both internal and external social networks. Both supported the social network growth by the alternative expatriate more so as a means to facilitate a more enjoyable experience during the assignment. The lack of interest on the part of the alternative expatriate organizations may be as a result of the roles of transference of knowledge my participants were involved in. Perhaps if organizational development became the focus of the assignment, rather than solely knowledge transfer, then organizations might pay greater attention to social networking career capital.

The role the foreign boss plays in the alternative expatriate assignment emerged in my research findings. In many cases, they were often viewed as best distant, and at worst, a barrier or impediment to the completion of the assignment. Perhaps the limited duration of the assignment for the short-term expatriates reduces the importance the foreign boss places on the assignment as a high priority item or that the foreign boss perceives the alternative expatriate as a threat as they were, in many cases, sent to train personnel to improve lagging results.

### *Knowing How*

The literature on the knowing how theme suggests that it is the most important one based on the organizations studied (Dickmann & Harris, 2005). Of the thematic areas I analyzed, however, the knowing how theme received the weakest support from

alternative expatriates with weak findings at both the individual and the organizational level.

My findings showed that organizational learning was the dominate form of knowing how career capital at both the individual and organizational levels. Both the organization and individuals also valued the skill of learning by doing. Finally, there was evidence of the alternative expatriates taking part in external sources of organized learning, or what I have called “self-learning,” as it involves self-initiated motive to desire this type of knowledge.

Dickmann & Doherty (2005) reported that learning through doing (on-the-job learning) was the dominant model in his research. My research showed that the alternative assignment participants were most interested in organization learning, but also valued learning by doing to a lesser extent. Further exploration of this theme should be considered to fully flesh out the modes used by expatriates for knowing how to learning new skills. Perhaps knowing how is less important to the alternative expatriates, especially those involved in knowledge or skills transfer, because they already have the knowledge necessary to undertake the assignment and do not consider how they gained the knowledge and skills in the first place.

### *Knowing Why*

The knowing why theme emerged as the one with the largest number of responses, both in terms of overall comments, but also relating to the richness of categories that emerged from the interviews. Both individual alternative expatriates and the organizations who hired them had their reasons for undertaking the alternative expatriate assignment. From the alternative expatriate basis, money appeared to



influence the decision more so than in the Dickmann, et al. (2008) findings. It was somewhat surprising that the alternative expatriates valued money as the research supported that all but one individual (who received a small monetary bonus for completing his assignment) did not gain any additional income by travelling abroad.

My findings diverged from Dickmann & Doherty's (2008) conclusions that individual fit to the organizational culture was a primary organization knowing why factor. Instead, my research found that the alternative expatriate organization appeared to value most the transfer of knowledge and skills. They selected the particular alternative expatriate because of the particular knowledge and skills the expatriate had. This was the typical reason given for why the participant was assigned to the task.

Strong intrinsic factors played an important part in the individual decision on why to undertake the assignments in my research as well as in the Dickmann findings (Dickmann, et al., 2008; Dickmann & Harris, 2005). Dickmann et al. (2008) found that family and individual development were the most important considerations, but also found support for work/life balance, length of the assignment, and security/safety were also strong knowing why reasons. My findings found that beyond monetary considerations, the alternative expatriates valued developing of new skills, interesting and challenging work, and age/ability as key deciding reasons why they chose to work abroad. Other considerations in my research found support for happiness, travel and adventure, and growth of career capital as strong secondary reasons why the alternative expatriates considered working abroad.

An important consideration at this point is to identify that Dickmann et al. (2008) found that there was a disconnect between why the individual traditional expatriate

choose to undertake their assignments and the organization's "perceptions" of the traditional expatriate's motives. A major part of this research project is to serve to inform the organizations who hire the alternative expatriate of what their employee's perceptions so as to help avoid a similar disconnect.

#### *Potential New Knowing Themes*

During the process of analyzing the data for the discovery of cultural and analytic categories (McCracken, 1988) three additional themes emerged from the data. These emerging themes were "knowing what", "knowing when & where", and "outcomes." While a complete exploration of these new emerging themes was beyond the scope of the project there were some preliminary findings I saw emerge from in the data to support these categories.

In my final review of the literature, I undertook an additional review to determine what had been written on the issues of knowing when, knowing where, and knowing what. Jones and DeFillippi (1996) added the categories of knowing what, knowing where, and knowing when to the original DeFillippi & Arthur (1994) career capital framework. My review of the literature, however, has not found any evidence of the Jones and DeFillippi (1996) concept being applied to the expatriate assignment. In terms of the outcomes theme, I have borrowed from a very recent Dickmann & Doherty (2010) paper. In my opinion, it is important to consider what the impact is on the career capital outcomes of the organization and the individual are. I have not been able to find evidence of these proposed themes being applied to the traditional expatriate assignment.

### *The Role of Altruism*

Although not achieving saturation, altruism, a knowing why sub-theme, was explored. I found evidence of altruism that emerged at the individual level, but also quite interestingly at the organizational level. This theme should be explored further, particularly when considering the evidence suggests that by aligning the values of the organization and the individual can result in an increased fit between them that can increase the loyalty and retention of the individual (Huselid, 1995).

### Research Implications

In my research, we have learned that alternative expatriates value the increases in their career capital from engaging in alternative expatriate assignments as much as the traditional expatriate assignee. While both the organization and the individual value the impact an international assignment has on career capital, there were some clear differences that emerged through my analysis of the data.

From an academic perspective, my findings have reinforced the use of the Dickmann & Harris (2005) expatriate career capital framework as a valid method of analyzing the alternative expatriate assignment. My research has shown the potential for the expansion of the Dickmann & Harris (2005) model to include previously unconsidered factors such as knowing when, knowing where, and knowing what. Finally my research helps to shed further light on the alternative expatriate assignment, especially around the career capital factors highly valued by those assigned on them, the alternative expatriate.

From a practitioner perspective, my findings can help to inform organizations to what their alternative expatriates value from a career capital perspective, when choosing

whether to undertake an international assignment. By providing this information to the organizations, the organizations may be able to adopt policy changes that help to increase the retention of their existing alternative expatriates and increase the recognition by the alternative expatriate talent pool as a workplace that has similarly aligned career capital values.

### Limitations and Future Research

My research design, interview format, and level of analysis have a number of strengths and weakness that must be considered when interpreting my results. The results of my research have highlighted areas that require further research and understanding, allowing for a broadening of the scope and depth of the alternative expatriate assignment experience.

#### *Limitations*

My research has been exploratory in design and the research results cannot be generalized, as the interview questions were asked of eight individual alternative expatriates who each have their own unique interpretations. Further, the analysis reported in this study is cursory and requires a more in-depth review. By asking only the individuals involved in the alternative expatriate assignment and not their organizations to participate, I have potentially limited the quality and results of the data available at an organizational level. The alternative expatriates interviewed were all born in Canada and this could further limit the results from a cultural and social perspective. Those interviewed were also within a particular age range (between 25 and 40) which could impact some of the findings. Finally, by selecting only self-initiated expatriates and short-term expatriates, the research may not have any bearing on any of the other types of

alternative expatriate assignments. On the positive side, even with the variety in the participants involved, there appeared to be good saturation of data across a number of different themes and categories. However, these findings require further validation and refinement.

### *Future Research*

Further research should be undertaken to explore the role of the foreign boss in the alternative expatriate assignment, especially to determine their perspective on how they view their role and the role of the alternative expatriates who are assigned working for or with them. My research findings suggest that in some instances the foreign boss was unsupportive, indifferent, and acted as an impediment to the successful outcome of the alternative expatriate's assignment.

Other studies might explore the differences between the different sub-types of the alternative assignments. For instance, is there a different impact on the one of the career capital categories once the short-term assignment reaches a certain length? Or do certain types of alternative expatriate assignments appeal to a certain type of individual?

Agreeing with what Dickmann & Doherty (2008) have suggested for traditional expatriate assignments, it would also be quite interesting to have a simultaneous global comparison of how the alternative expatriate perceives the career capital across the different global cultures. Particularly interesting might be the application of the career capital framework to the alternative expatriates of a significantly culturally different nation such as one from a developing nation in Asia or Africa to compare against my findings. This research would be timely given the latest research on international staffing

suggests that the increasing role of developing nations will be impacting the expatriate talent pool through an increasing demand for talent (Tarique & Schuler, 2010).

One thing drawn out in from my research is the lack of longitudinal studies of the impact these types of assignments have on the careers of the alternative expatriate. This would be especially valuable to inform the self-initiated expatriate who often accepts an assignment without any expectations of returning to a particular firm.

### Conclusions

My research provides preliminary evidence that supports the use of the Dickmann & Harris (2005) framework for analyzing the career capital of the alternative expatriate. While only exploratory in design, this study has offered some suggestions as to the differences between traditional expatriates and the growing category of the alternative expatriate.

As organizations consider whether the use of the alternative expatriate assignment is a right choice for their particular need, I have provided an overview of the topics that are of significant interest to the alternative expatriate. Evidence has shown that these expatriates highly value the learning of new skills, the pleasure derived from interesting and challenging work, and the creation of additional career capital. The alternative expatriates also consider age and ability, particularly their families, as an important factor in their decision on whether to accept the assignment. For organizations involved in the transfer of knowledge and skills by the alternative expatriate, further evidence supports the important role the foreign workers play to these expatriates.

By listening to the things that matter most to their alternative expatriates, the organization can explore potential policy and strategic human resources changes with the

goal of increasing organizational fit and job embeddedness between the organization and the individual. By increasing the fit and embeddedness of the individual to the organization, the alternative expatriates are likely to become more loyal, and the organization enhances their chances of increasing their retention rates and in attracting new talent in the increasingly competitive global talent pool.

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## Appendix A: Semi-Structured Interview Questions

The following questions will be asked:

i) **Biographical**

- a. Name (this will be recorded in writing only and a separately code number will apply to the survey for identification purposes).
- b. Current City
- c. Age
- d. Country & City of Birth
- e. Education Level

ii) **Employment History**

- a. Historical number of Employers
- b. Expatriate Employer
- c. Home Organization Country
- d. Current Employer
- e. Current employment position

iii) **Expatriate Background**

- a. How did you become an expatriate? (Prompts: Forced, Self, Recruited, Encouraged, etc.?)
- b. What positive features did you consider in working abroad? (Prompts: Compensation, Travel, Culture, Experience, Career moves)
- c. What negative features did you consider in working abroad? (Prompts: Culture, Family, Compensation, Working Spouse, Danger, Stress)
- d. What was your job role at time of the international assignment?
- e. How well and what specifically did your organization prepare you to go abroad? (Pre-expatriate Phase Prompt: Good and Bad, Organizational Policies, HR Practices)
- f. How well and what specifically did your organization do while you were abroad? (Expatriate Phase Prompt: Good and Bad, Organizational Policies, HR Practices)
- g. What were the major new skills you learned while you were abroad that you could specifically attribute to working abroad?
- h. How well and what specifically did your organization prepare you to return home? (Repatriation Phase Prompt: Good and Bad, Organizational Policies, HR Practices)
- i. What was your job role upon your return from international assignment?
- j. Were you able to capitalize upon the new skills you learned when you returned to your new position?
- k. How did that make you feel?

- l. What three things could your organization have done differently that would have made a major difference in your experience?
- m. How would you define a failed expatriate assignment?
- n. Do you know someone who has failed in their expatriate assignment? If so, without naming names, why do YOU think they ultimately failed?

iv) **Career Background**

- a. What do you see as being your responsibility, when it comes to managing your own career? (Prompts: education, skills training, diverse experiential backgrounds)
- b. Do you set personal career goals?
- c. Do you have an ultimate career goal? What is it?
- d. How does the international assignment fit in terms of your own personal career aspirations? Did it help or hinder?

v) **Organizational Commitment Questions**

- a. How do you feel about employees who work for the same organization their whole careers? (Prompt: What about other people? How do you think they feel?)
- b. How do you feel about employees who switch organizations to benefit their own careers? (Prompt: What about other people? How do you think they feel?)
- c. Do you feel as though there are any generational differences?
- d. How would you place yourself in those two descriptions?
- e. How many employers do you expect you might have over the life of your career?
- f. How would you describe the loyalty you feel to your existing organization?
  - i. What could be done to attract you to another employer?
  - ii. What could your existing organization do to attract you to stay longer?

vi) **Organizational Policy Based**

How would you describe your organizational policies as they relate to the following:

- a. Strategic International Human Resources Management
- b. Work-Life Balance
- c. Organizational Culture
- d. Pay
- e. Additional Rewards for international assignment
- f. Culture adjustment training
- g. Relocation Services

vii) **Performance Management**

- a. Did your company have a specific task in mind when you were transferred into your position?
- b. Did the company define what success was before you left for your assignment?
- c. How did your company measure your performance?
- d. How did you define a successful performance?
- e. How did your measurement of success differ from the organization?
- f. How did your measurement of success fit in with the organization's definition?

## Appendix B: Interview Consent Form

**To:** [insert name]

**From:** J. Scott Wilson, University of Prince Edward Island School of Business

**Date:** [insert date], 2010

**Re: Research Project:** Voices of Experience: Individualizing the Expatriate Career

I am a MBA Student attending the University of Prince Edward Island in Charlottetown, Prince Edward Island. Part of the requirements of my academic programme is to conduct a signature research project. I am undertaking this research project under the direction of my faculty advisor, Dr. Wendy Carroll.

The purpose of my study is to learn more about how professionals, like yourself, those who work outside their own home countries, manage their individual careers. Specifically I am interested in what role expatriate career management might play in how long the individuals will remain with their organization, and what factors additionally might impact this decision to stay, or go. Historically researchers have looked at research from an organizational perspective. I am interested in hearing from the individuals who work in these roles to hear what you have to say.

I am interviewing approximately eight professional “expatriate” managers who have travelled abroad, *for at least one year* and have subsequently returned to the home organization. These interviews will be conducted using the “Long-Interview” method in which I listen and identifying common themes that emerge among all of the interviews. This information could be useful to help guide future research in the identified areas.

**Please read this letter and content carefully, and sign if you are comfortable with proceeding with this interview.**

### Consent Form

I \_\_\_\_\_, acknowledge that I have been informed that the purpose of this study is to learn more about expatriates and how they manage their careers. The location of this interview has been conducted in a place and at a time that was convenient to me. I understand that this survey will take approximately two hours to complete and agree to participate in the interview with the above named researcher, and that I do not need to do anything to prepare for this interview, nor bring anything special with me. I acknowledge that there is nothing that I am aware of that would cause a conflict of interest between myself and the researcher.

I understand that I may skip any question at any time, make request a break at any point in time, and may withdraw from the interview at any point in time without consequence.

I understand that my name and the information gathered will be kept separate, and that the interviews in their totality will remain confidential. I understand that, while my name will not be used in the final report, I consent and agree that the researcher may use



quotations taken from the interview along with a description of my industry, age, sex, number of years abroad, and home and host countries to use for illustration purposes in the final report.

I understand that this interview will be audio recorded and the research will be taking additional notes. All notes and recordings will be stored in a secure location and electronic versions will be password protected and encrypted. I understand that the information gathered will be only available to the researcher and his thesis/signature project supervisor.

I agree that the data collected can be stored indefinitely in password protected, encrypted format for use by the researcher at a later date, but that my informed consent to use this data will be required at that future time, and I hereby consent to being contacted by the researcher in order to obtain this permission.

If such permission is required, I would prefer to be contacted via (method such as email, fax machine, or mailing address): \_\_\_\_\_

By signing this form I am giving my consent to participate in this interview and for my information to be used by the researcher for the purposes of this project. I understand I may keep a copy of this signed consent form. If I have any questions or concerns about this study, I may contact the research, Scott Wilson via email at [sjwilson@upei.ca](mailto:sjwilson@upei.ca). I may also contact his signature project/thesis supervisor, Dr. Wendy Carroll at (902) 566-0573 or via email at [wcarroll@upei.ca](mailto:wcarroll@upei.ca). I understand that the Research Ethics Board of UPEI has approved this research project. I understand that I can contact the UPEI Research Ethics Board at 902-566-0637 or by email at [lmacphee@upei.ca](mailto:lmacphee@upei.ca) if I have any concerns about the ethical conduct of this study.

\_\_\_\_\_  
Signature of Participant

\_\_\_\_\_[insert date], 2010\_\_\_\_\_  
Date

\_\_\_\_\_ I wish a copy of the final report to be emailed to me in PDF format at the following email address: \_\_\_\_\_.

## Appendix C: Audio Consent to Record Script

### SCRIPT TO ATTEST OF AUDIO RECORDING

“To aid our research today, the interviews will be recorded using this digital tape recorder. These interviews will then be transcribed and your responses will be used, along with others, to develop areas of interest or themes. You have already agreed in writing to have this interview audio recorded, however for the interests of recording, I will have you provide your consent in spoken form.

Today’s date is: [speak date of interview].

This interview is being held at: [state location]

at [state time].

Because of confidentiality purposes, we have coded this interview as interview # [state code number].

Do you agree to the audio recording of this interview? Please clearly state yes or no.

[wait for the participants response].

Have you agreed to participate in this interview of your own free will and been instructed that you can terminate this interview at any time you want without any penalty or obligation. Please clearly state yes or no.

[wait for the participants response].

Having heard that you agree to this audio recording and that you are aware of your rights to end this interview whenever you wish without penalty or obligation, we shall proceed with the interview.

[BEGIN INTERVIEW]”

## Appendix D: Debriefing Script

“As part of our ethical processes in dealing with our research today, I will be debriefing you formally.

First of all, I would like to thank you very much for your participation today. I am very honored that you have allowed me to listen to your thoughts and comments as it reflects your experiences as an expatriate.

I will now outline briefly our next steps in research, what will be done with the findings and when you should expect to hear from me next.

- Step #1 – I plan on interviewing approximately eight individuals who have expatriate experiences such as yours.
- Step #2 – Your (and their) results will be transcribed into an electronic document that will allow me to analyze the results.
- Step #3 – I will look into each participant’s results and identify common themes or categories. This will help identify similarities and differences.
- Step #4 – I will write my final report that will identify my findings after all of these interviews. I will use short excerpts from each interview to aid in the presentation of my findings. These excerpts will not personally identify you, but will mask your identity, while providing some of your particulars. These particulars will be your sex, age, industry, years of experience, your home country and your host country. These details might assist future researchers potentially further identify additional issues, but generally provide a contextualization of the situation.
- Step #5 – I will defend my findings at the University of Prince Edward Island as part of my thesis/signature project.
- Step #6 – Once the report has been successfully completed and accepted as meeting my thesis/signature project, if you wish to receive it, I will email you an Adobe Acrobat version of the final accepted paper.

I expect to complete the necessary interviews, transcription, and my summary notes of your interview prior to June, 2010.

I expect the analysis and codifying/categorizing of all the interviews to be completed prior to the end of July, 2010.

I would then expect to write my final report and have it completed by August of 2010, after which a defense of my thesis/signature project will occur. This defense is projected by the School of Business, to occur in September, 2010.

Once I successfully defend my report, I will email you a PDF version of the final report, if you have expressed an interest in receiving a copy.

This represents the end of our interview process today. Again, I wish to sincerely, thank your time and assistance in helping me to explore this new area of research in the expatriate field, and lending your “voice of experience” as it relates to the expatriate career.”

## Appendix F: Final Career Capital Framework Used

Skill Learned		Knowledge, Skills, Abilities		Intra-Firm, Inter-Firm, Professional, Social		Identity, Values, Interests		When it was Learned & Where it was Learned		What is done with learning	
KNOWING	WHAT	HOW	WHO	WHY	WHEN, WHERE			OUTCOME			
Perspective	Skill	Knowing How	Knowing Whom	Knowing Why	Skills Known Before Assignment	Skills Learned During Assignment	Skills Learned After Assignment	Impact of Learning			
Organization	Ability to Adapt, People Skills, Cultural Skills, Overcoming Challenges, Client Satisfaction, Transfer of Knowledge	EXPLICIT LEARNING: Organizational Learning, Self Learning (Course), TACIT LEARNING: Observation, Doing	Home Boss, Foreign Boss, Senior Managers, Third Parties, Co-Workers Travellers, Co-Workers Home Office, Co-Workers Foreign Office, Mentor, Helpful Persons	Task Assigned, Why Selected, Retention of Expat, Expat Skills Development, Expat Career Development, Client Needs	Existing Skills	Skills Learned on Task	Skills Learned Reflection, Knowledge Management	Skills/Knowledge Used, Retention of Expat, Expat Skills Development, Expat Career Development, Success, Failure, Satisfaction of Client, Transfer of Knowledge Intra Firm,			
Individual	Ability to Adapt, People Skills, Cultural Skills, Overcoming Work Challenges, Leaving Behind, Returning Home, Cultural Adjustment, Overcoming Fears, Perspective on wealth	Being seen, EXPLICIT LEARNING: Organizational Learning, Self Learning (Course), TACIT LEARNING: Observation, Doing	Home Boss, Foreign Boss, Senior Managers, Third Parties, Co-Workers Travellers, Co-Workers Home Office, Co-Workers Foreign Office, Mentor, Helpful Persons, Socialization Network, Other Expatriates, Family	Travel, Cultural Experiences, Career Capital Internal, Career Capital External, Interesting Work, Fear if Don't Go, Client Relationship, Helping, Job Responsibility, Learn New Skills, Age/Ability, Monetary Rewards, Altruism	Existing Skills, Position Before	Skills Learned on Task, Position During	Skills Learned Reflection, Position After	Skills/Knowledge Used, Change in Job Internal, Change in Job External, Increased Skills, Lost Time, Increased Career Network, Change in Values, Change in Worldview, Change in Loyalty, Expectations of Career, Stimulating Work (Interesting, Exciting, Challenging)			