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TURNOVER INTENTIONS OF SELF-INITIATED EXPATRIATES: THE ROLE OF
SERVANT LEADERSHIP AND ORGANIZATIONAL EMBEDDEDNESS

A dissertation submitted to the Graduate Faculty of The University of Mississippi School of
Business Administration in partial fulfillment of the requirements for the degree of Doctor of
Philosophy.

by

CALEB W. LUGAR

August 2021

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ABSTRACT

The topic of this dissertation is turnover of self-initiated expatriates (SIEs). The significance of the SIE domain is evidenced by the exponential growth in SIE literature since the publication of the seminal research article authored by Inkson, Arthur, Pringle, and Barry (1997). Research in the SIE domain is also of interest to practitioners employed in multinational organizations who increasingly recognize that SIEs are an untapped source of global talent.

To contribute to the SIE literature, in Essay One, of my three-essay dissertation, I first provide a systematic SIE literature review. Second, my unique contribution is a systematic review of the definitions used in past SIE studies through which I identified a complete set of definitional elements for SIEs. Third, I examine the evolution of these elements using the novel historic lexical constellation analysis to develop an integrated SIE definition. Fourth, I provide a synthesized model of the quantitative literature that pictorially represents the nomological network of the SIE phenomenon. Finally, I develop a theory-based typology of globally mobile workers and provide a roadmap for future research directions in the SIE domain.

In Essay Two, I address the knowledge gaps identified in the nomological network described in Essay One to model the unexamined impact of servant leadership on SIE turnover that is mediated by SIE embeddedness. In Essay Three, I combine quantitative and qualitative approaches using the explanatory sequential mixed-method approach to study the organizational view of SIEs retention in multinational organizations, zooming in on the influence of SIE embeddedness and cross-cultural adjustment.

The following are the unique and valuable contributions of my dissertation:

- 1) a systematic review of the SIE literature enriched with the development of an integrated SIE definition derived from the use of a novel method; 2) the development of a theory-based typology of globally mobile workers; 3) an empirical examination of the impact of servant leadership on SIE retention within a single multinational organization; 4) a mixed-method examination of SIE retention from the managerial perspective.

DEDICATION

I dedicate my life and this work to Jesus Christ who said,
“My grace is sufficient for you, for my power is made perfect in weakness.” Therefore, I
will boast all the more gladly about my weaknesses, so that Christ’s power may rest on
me. That is why, for Christ’s sake, I delight in weaknesses, in insults, in hardships, in
persecutions, in difficulties. For when I am weak, then I am strong.

2 Corinthians 12:9-10

LIST OF ABBREVIATIONS

Abbreviation	Description
AE	Assigned Expatriate
AR	Annual Report
AVE	Average Variance Extracted
CFA	Confirmatory Factor Analysis
CFI	Comparative Fit Index
COR	Conservation of Resources
FELO	Foreign Executive in Local Organizations
KR	Kenward-Roger Correction
MNO	Multinational Organization
OE	Overseas Experience
REML	Restricted/residual Maximum Likelihood
RMSEA	Root Mean Square Error of Approximation
SIE	Self-initiated Expatriate
SL	Servant Leadership
SRMR	Standardized Root Mean Square Residual
VHB	German Academic Association for Business Research

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TABLE OF CONTENTS

ABSTRACT.....	ii
DEDICATION.....	iii
LIST OF ABBREVIATIONS.....	iv
ACKNOWLEDGEMENTS.....	v
LIST OF TABLES.....	xii
LIST OF FIGURES.....	xiv
ESSAY ONE: CLARIFYING THE CONSTRUCT OF SELF-INITIATED EXPATRIATES: A SYSTEMATIC REVIEW OF STUDIES AND DEFINITIONS.....	1
Essay One Introduction.....	1
Situating SIEs With a New Globally Mobile Workers Typology.....	3
Figure 1.1 Typology of Globally Mobile Workers.....	7
Reviewing the Reviews of SIE Studies.....	8
Table 1.1 Previous SIE Reviews.....	8
Reviewing Origins of SIE Research.....	17
Reviewing the Efforts of Defining Self-Initiated Expatriates.....	19
Table 1.2 SIE Terms Introduced Over Time.....	21
Table 1.3 SIE Definitional Elements.....	22
Review of SIE Definitions.....	23
Nomological Network of the SIE Definition.....	25
Figure 1.2 Nomological Network of SIE Definition.....	25
Tracing the Evolution of the SIE Definition Over Time.....	28
Overview of Lexical Analysis used to Clarify the SIE Construct.....	30
Distributional Concept Analysis of SIE Definitions.....	32
Table 1.4 Changes in SIE Verbal Constellations Over Time.....	34
Table 1.5 Historical SIE Definition Development.....	37
Systematic Literature Review of SIE Research.....	37
Figure 1.3 SIE Publications Over Time.....	38
Search Results.....	38

Table 1.6 Types of SIE Documents Found in Systematic Review	38
Journals Publishing SIE Research and their Impact Factors	39
Table 1.7 Journal Impact Factor Ratings	40
SIE Nomological Network Synthesized from My Systematic Literature Review.....	41
Phase 1	42
Figure 1.4 Systematic Literature Review Model – Phase 1.....	43
Phase 2	43
Figure 1.5 Systematic Literature Review Model - Phase 2.....	45
Phase 3	45
Figure 1.6 Systematic Literature Review Model - Phase 3.....	46
Review of Suggested Future Directions for SIE Research	46
Table 1.8 Concepts Found in Future Directions.....	47
Future Directions	51
Table 1.9 Future Directions in SIE Research	54
Summary of Essay One.....	56
Using Essay One to Guide Essay Two and Essay Three	57
ESSAY TWO: SERVANT LEADERSHIP AND TURNOVER INTENTIONS OF SELF-INITIATED EXPATRIATES: A MODERATED MEDIATION STUDY OF ORGANIZATIONAL EMBEDDEDNESS AND ORGANIZATIONAL IDENTIFICATION	58
ESSAY TWO ABSTRACT	58
Introduction:	59
Theoretical Background and Hypotheses	62
Figure 2.1 Hypothesized Moderated Mediation Model	62
Definition of Servant Leadership and Overview of COR Theory	64
Definition of Servant Leadership	64
Overview of COR Theory	65
Using COR Theory to Explain the Relationship between Servant Leadership and SIE Turnover Intentions.....	67
The Relationship between Servant Leadership and Organizational Embeddedness	69
The Relationship Between Organizational Embeddedness and Turnover Intentions	70

The Mediating Effect of Organizational Embeddedness	71
The Moderating Effect of Organizational Identification	71
Methodology.....	74
Description of Sample and Survey	74
Table 2.1 Socio-demographic profile of respondents.....	76
Measures.....	77
Findings	81
Table 2.2 Descriptive statistics and correlations between variables.....	82
Table 2.3 Results of the moderated-mediation analysis (PROCESS macro, Model 7)	83
Table 2.4 Conditional indirect effect and index of moderated mediation (PROCES macro, Model 7)	84
Figure 2.2 Moderating effect of organizational identification on the servant leadership-turnover intention relationship	85
Discussion.....	85
Practical Implications	88
Limitations	89
Conclusion.....	92
ESSAY THREE: A MANAGERIAL PERSPECTIVE OF SIES IN A MULTINATIONAL ORGANIZATION: AN EXPLANATORY SEQUENTIAL MIXED-METHOD STUDY	93
Essay Three Abstract.....	93
Introduction	94
Sequential Mixed-Method Design	94
Quantitative Stage of the Sequential Mixed-Method: Archival Data Analysis	97
Table 3.1 Overview of Available Archival Data	98
Table 3.2 Annual Review Question Summary.....	99
Table 3.3 Review and Evaluation of Question 3 from Annual Review.....	100
Retention Rates of SIEs in Subsidiary Units	102
Figure 3.1 Subsidiary Unit Retention Rates	103
Research Question Guiding the Quantitative Stage of the Study.....	103
The Quantitative Data Set Used in the Quantitative Stage	104

Analysis of the Data Used in the Quantitative Stage	107
Table 3.4 Solution for Fixed Effects (Q4)	108
Table 3.5 Solution for Type 3 Fixed Effects (Q4).....	108
Table 3.6 Solution for Fixed Effects (Q5)	109
Table 3.7 Solution for Type 3 Fixed Effects (Q5).....	110
Introduction and Overview of Qualitative SIE Studies.....	111
Table 3.8 Concentration of SIE Qualitative Studies in Journals	112
Table 3.9 Sampling Techniques Used in SIE Qualitative Studies.....	113
Table 3.10 Number of Study Participants	114
Table 3.11 Interview Designs	115
Table 3.12 Host Countries of SIE Interviewees	116
Table 3.13 Industry Setting of SIE Studies.....	117
Table 3.14 Theories Guiding Qualitative SIE Studies	118
Table 3.15 Topics of SIE Qualitative Studies	119
Review of Qualitative Studies Examining SIE Concepts of Managerial Importance.....	119
Table 3.16 SIE Qualitative Studies Phenomenon Levels	120
Figure 3.2 Thematic Synthesis of Qualitative SIE Studies Focused on Phenomenon of Managerial Importance.....	123
Review of Adjustment, Embeddedness, and Retention in Qualitative SIE Research	124
Qualitative Studies Addressing Adjustment	124
Figure 3.3 Qualitative Studies Related to SIE Adjustment.....	128
Qualitative Studies Related to Embeddedness.....	128
Figure 3.4 Qualitative Studies Related to SIE Embeddedness	129
Qualitative Studies Related to Retention	129
Qualitative Stage of My Study	131
Qualitative Data Sources.....	131
Table 3.17 Description of Interview Data	132
Table 3.18 Characteristics of Interview Participants	133
Qualitative Data Analysis	133

Qualitative Results of Addressing Research Question 1: “How does the professional tenure of SIEs impact retention at the subsidiary unit level in a multinational organization?”	134
Table 3.19 Needs of Occupationally Embedded SIEs.....	134
Family Needs.....	138
Professional Needs.....	140
Psychological Needs.....	142
Research Question 2: “How does adjustment affect the embeddedness and retention of SIEs?”	143
Table 3.20 Adjustment Factors Influencing SIE Embeddedness and Retention	144
Personal adjustment sub factors that enhance embeddedness and tenure.....	147
Personal adjustment factors that inhibit embeddedness and tenure.....	148
Personal, relational, and contextual factors as boundary conditions	149
Research Question 3 Results.....	151
Table 3.21 Addressing SIE Need and Adjustment Factors Through Policies, Procedures, and Practices	152
Table 3.22 The Role of Member Care for Experienced SIE Adjustment, Embeddedness, and Retention	157
Summary of the Findings of this Study	158
Model Proposal in Essay 3	159
Figure 3.5 Managerial Perspective on Subsidiary SIE Retention Model	161
Limitations of this Study	161
Conclusion.....	163
List of References.....	164
List of Appendices:.....	189
Appendix A – Full List of Retained and Rejected SIE Review Articles	190
Appendix B – SIE Definitions in Extant Literature	201
Appendix C – Python Code Used to Conduct DPFA of SIE Definitions.....	212
Appendix D - Additional Articles Included in Systematic Review	218
Appendix E – Journal Impact Factor Analysis from Systematic Review.....	219
Appendix F – Future Directions in Extant SIE Literature	221

Appendix G – Addressing Criticisms of COR Theory 249

- Resource Definition (Addressing Resource Ambiguity and Tautology) 249
- Determining Resource Value 250
- Measuring Resources..... 252
- Conserving and Acquiring Resources..... 254

Appendix H – Survey Items 256

Appendix I – Analysis of the Changes in Annual Review Questions Over Time..... 262

Appendix J - Qualitative Interview Protocol 279

LIST OF TABLES

TABLE		PAGE
Table 1.1	Previous SIE Review	
Table 1.2	SIE Terms Introduced Over Time	
Table 1.3	SIE Definitional Elements	
Table 1.4	Changes in SIE Verbal Constellations Over Time	
Table 1.5	Historical SIE Definition Development	
Table 1.6	Types of SIE Documents Found in Systematic Review	
Table 1.7	Journal Impact Factor Ratings	
Table 1.8	Concepts Found in Future Directions	
Table 1.9	Future Directions in SIE Research	
Table 2.1	Socio-demographic Profile of Respondents	
Table 2.2	Descriptive Statistics and Correlations Between Variables	
Table 2.3	Results of the Moderated-mediation Analysis (PROCESS macro, Model 7)	
Table 2.4	Conditional Indirect Effect and Index of Moderated Mediation (PROCESS macro, Model 7)	
Table 3.1	Overview of Available Archival Data	
Table 3.2	Annual Review Question Summary	
Table 3.3	Review and Evaluation of Question 3 from Annual Review	
Table 3.4	Solution for Fixed Effects (Q4)	
Table 3.5	Solution for Type 3 Fixed Effects (Q4)	

Table 3.6	Solution for Fixed Effects (Q5)
Table 3.7	Solution for Type 3 Fixed Effects (Q5)
Table 3.8	Concentration of SIE Qualitative Studies
Table 3.9	Sampling Techniques Used in SIE Qualitative Studies
Table 3.10	Number of Study Participants
Table 3.11	Interview Designs
Table 3.12	Host Countries of SIE Interviewees
Table 3.13	Industry Setting of SIE Studies
Table 3.14	Theories Guiding Qualitative SIE Studies
Table 3.15	Topics of SIE Qualitative Studies
Table 3.16	SIE Qualitative Studies Phenomenon Levels
Table 3.17	Description of Interview Data
Table 3.18	Characteristics of Interview Participants
Table 3.19	Needs of Occupationally Embedded SIEs
Table 3.20	Adjustment Factors Influencing SIE Embeddedness and Retention
Table 3.21	Addressing SIE Need and Adjustment Factors Through Policies, Procedures, and Practices
Table 3.22	The Role of Member Care for Experienced SIE Adjustment, Embeddedness, and Retention

LIST OF FIGURES

FIGURES		PAGE
Figure 1.1	Typology of Globally Mobile Workers	
Figure 1.2	Nomological Network of SIE Definitions	
Figure 1.3	SIE Publications Over Time	
Figure 1.4	Systematic Literature Review Model – Phase 1	
Figure 1.5	Systematic Literature Review Model – Phase 2	
Figure 1.6	Systematic Literature Review Model – Phase 3	
Figure 2.1	Hypothesized Moderated Mediation Model	
Figure 2.2	Moderating Effect of Organizational Identification on the Servant Leadership-Turnover Intention Relationship	
Figure 3.1	Subsidiary Unit Retention Rates	
Figure 3.2	Thematic Synthesis of Qualitative SIE Studies Focused on Phenomenon of Managerial Importance	
Figure 3.3	Qualitative Studies Related to SIE Adjustment	
Figure 3.4	Qualitative Studies Related to SIE Embeddedness	
Figure 3.5	Subsidiary SIE Retention Model	

ESSAY ONE: CLARIFYING THE CONSTRUCT OF SELF-INITIATED EXPATRIATES: A SYSTEMATIC REVIEW OF STUDIES AND DEFINITIONS

Essay One Introduction

The need for sourcing highly qualified talent in multinational organizations around the world has increased dramatically due to globalization of business activities and the rise of knowledge work in today's interconnected economies (Haslberger & Vaiman, 2013). Multinational organizations have attempted to meet this need primarily through sourcing talent internally by offering time-bound and tailored international relocation packages to their employees to work abroad as expatriates (Edstrom & Galbraith, 1977). The employees that accept this offer are referred to as company-transferred or assigned expatriates (AEs). However, in the 21st century, the sole reliance on AEs to meet the human capital needs of multinational organizations has proven inadequate as burgeoning business opportunities in emerging markets have engendered the demand to identify new sources of international talent, then can be supplied by AEs alone. In particular, the increase in demand for internationally mobile employees, who are willing and able to serve not only in the traditional established markets but also in the challenging emerging markets, has forced multinational organizations to tap into the new talent pool of *self-initiated expatriates* (Gunz & Peiperl, 2007; Guthridge, Komm, & Lawson, 2008; Doherty, 2013).

Self-initiated expatriates (SIEs), that self-initiate their international relocation (Haslberger & Vaiman, 2013), are distinct from assigned expatriates (AEs), that are offered an international assignment under the assumption that they would thereafter either return to their

home country organization or be transferred to another host-country subsidiary. AEs are typically induced to accept these temporary assignments with the enticing associated monetary and career incentives that would help them achieve their desired professional goals (Linder, 2019). In contrast to AEs, SIEs, who self-initiate their search for international employment opportunities, are intrinsically motivated for more personal reasons. Typically, SIEs possess higher levels of education and intend to return to their home countries at some point in the future (Haak-Saheem & Brewster, 2017; Al Ariss, Koall, Ozbilgin, Suutari, Cao, Hirschi, & Deller, 2012).

The SIE research is booming with the number of published research studies on SIEs growing by a three-fold increase over the last decade when compared to the previous decade. While the exponential growth of published SIE studies has covered a wide range of research themes, it has also revealed a lack of agreement about the definition of an SIE. This lack of agreement has made SIE studies fragmented, disparate, and difficult to compare and integrate. To address this impeding issue, I have organized this Essay One in the following way. I first review the types of globally mobile workers that have been identified in the literature to situate SIEs within the typology of these types of workers. Second, I provide an overview of the previous SIE reviews to highlight their contributions and delineate how my systematic review adds to this body of SIE literature. Third, I review the historical terms and definitions used in the past studies of SIEs, analyze the evolution of the definitional elements within which they are embedded and propose a new unifying SIE definition. Fourth, I have conducted a comprehensive and amalgamated systematic review of 187 journal articles on self-initiated expatriates that have been published over the last two decades. I derive a synthesized model of the quantitative SIE studies and pictorially represent the nomological network of the SIE construct. In conclusion, I

review and analyze the future research directions suggested in the reviewed studies to construct a roadmap for future research directions in the SIE domain.

The main contributions, presented in my Essay One, are: 1) the development of a new theory-based typology of internationally mobile workers; 2) the development of a unifying definition of SIEs by identifying its past definitional elements; 3) the validation of my proposed definition using the method developed by Bolla et al. (2019); and 4) a systematic review of proposed directions for future SIE research. My contributions not only enhance the clarity of the SIE construct (Post, Sarala, Gatrell, & Prescott, 2020), but also provide a rich canvas of where SIE research began, its stat-of-the-domain, and where it is heading in its future development.

Situating SIEs With a New Globally Mobile Workers Typology

In this section, I review three previously proposed typologies of globally mobile workers before proposing my new typology that I developed following the suggestion by Andersen, Dickmann, and Suutari (2018, p. 16) to “concentrate on less elaborate typologies that are based only on a few criteria and use broad types to subsequently develop research.” I start with reviewing the first taxonomy, *The Taxonomy of Global Work Experiences*, which was developed by Shaffer, Kraimer, Chen, & Bolino (2012). This taxonomy was built based on the following three dimensions: non-work disruption, cognitive flexibility, and physical mobility. By allowing for ranking the work experiences of international employees from low to high on each dimension, the authors of this taxonomy proposed a framework to classify globally mobile employees, which includes global domestics, global virtual team members, international business travelers, short-term assignees, flexpatriates, and both corporate and self-initiated expatriates. The deficiencies of this taxonomy are its elaborate structure, omission of some types of globally mobile workers, and its lack of theoretical grounding.

The second typology was developed by Arp (2013) with the aim to categorize foreign executives in local organizations (FELOs) along the five dimensions of (1) income higher than local peers, (2) long tenure, (3) local spouse, (4) “at home” in host-country, and (5) consciously utilizing unique insider and outsider status. The configuration of these dimensions yield four different FELO types: the global executive nomad, the innate identity, the entrepreneurial innovator, and the localized executive. While this typology offers a classification of a small subset of globally mobile workers, the dimensions of the typology are not continuous variables grounded in theory.

The third *Typology of Internationally Mobile Employees* was developed by Andresen, Bergdolt, Margenfeld, and Dickmann (2014), that proposed a framework with two dimensions: organizational mobility and initiative. The organizational mobility dimension refers to the mobility of individuals either between organizations (external mobility) or within the organization (internal mobility) when they move to a new country. The initiative dimension refers to the “first key binding activity” that is initiated either by the individual or by the organization. This two-dimensional framework yields four types of expatriates: intra-self-initiated expatriate, inter-self-initiated expatriate, assigned expatriate, and drawn expatriate. While this classification system is parsimonious, its dimensions are neither continuous nor theory based.

My review of these extant typologies of internationally mobile workers has revealed that they do not meet Collier et al’s. (2012) standards for typologies because they are not based on continuous dimensions, and they are not theoretically grounded. Rather, they are built upon discrete categories that are not based in theory. To address this deficiency, I propose a new typology that is built on the theoretical frame of Baruch, Altman, and Tung’s (2016) ecosystem

and has the dimensions that are both continuous and theory-based, thus meeting the criteria for typologies (MacDougall, Baur, Novicevic, & Buckley, 2014). Moreover, my proposed typology of globally mobile workers is comprehensive, as it accounts for SIEs and other types of international workers.

The foundational framework used for my proposed typology is the ecosystem framework applied to careers and the global labor market. This open system framework is based on the assumption that nations, institutions, and individuals, such as globally mobile workers, are connected actors that influence each other in a system of interdependence at multiple levels of analysis (Baruch et al., 2016; Lee, Felps, & Baruch, 2014; Arthur, Hall, & Lawrence, 1989).

At the micro level, individuals in the global labor market can either personally initiate or respond to outside actors' initiatives when they act, communicate, and interact with other individuals and institutions in the ecosystem. Their personal initiative has three constituent components: self-starting, proactivity, and persistence (Fay & Frese, 2000). The self-starting component refers to the degree of psychological distance that an individual must overcome in order to do something that is both difficult and goes beyond what is usually done (Frese & Fay, 2001). For example, if an individual decides to pursue a difficult goal (e.g., to work abroad) which is not normally undertaken by others in similar situations and without being prompted, he or she would have engaged in self-starting behavior (Fay & Frese, 2000).

The second component of the personal initiative is proactivity, which refers to an individual's anticipation of future challenges and the subsequent actions that are taken to overcome them in advance (Frese & Fay, 2001). Proactive individuals, such as SIEs, anticipate both challenges and opportunities in the future and solicit feedback before a need arises. The final component in the personal initiative is persistence, which refers to the determination of

individuals, such as SIEs, to continue pursuing goals even when faced with setbacks, failures, and frustrations (Fay & Frese, 2000; Andresen et al., 2020). Each component of personal initiative proceeds in an action sequence comprised of four steps: goal setting, information seeking, planning, and monitoring and feedback (Frese & Fay, 2001).

As the three constituent components may function either synchronously or asynchronously, they reinforce each other influencing an individual's level of personal initiative (Bledow & Frese, 2009; Frese, Fay, Hilburger, Leng, & Tag, 1997). Given the levels of their personal initiative components, individuals can be either high or low in their level of personal initiative (Frese & Fay, 2001; Bledow & Frese, 2009).

Personal initiative is the first dimension of my proposed typology of the globally mobile workforce. Globally mobile workers who are high on personal initiative are self-initiated expatriates (SIEs). SIEs are self-starting, proactive, and persistent in their goal setting, information seeking, planning and seeking feedback related to their decision to work internationally. In other words, SIEs seek out and choose opportunities to engage in work activities outside of their home country. In contrast, the personal initiation dimension is typically low for assigned expatriates (AEs) and other international workers who do not self-start, do not engage proactively, and do not persist with a decision to move internationally on their own, but rather react to the initiatives of other actors in their ecosystem.

The second dimension in my proposed typology is human capital. Human capital theory posits that individuals use a cost and benefit analysis to decide, how much effort, time, and resources they will invest in their training and education (Fang, Zikic, & Novicevic, 2009). This investment in their increased human capital reflects the economic value of their skills, capacity to learn, and accumulated experience. Two components comprise human capital. The first

component is the stock component, which is made up of the level of the knowledge, skills, abilities, and level of education possessed by an individual at a particular point in time. The second component is the flow component, which includes the investment in education and training that increases the individual’s capacity for acquiring new knowledge and skills through learning (Favell, Feldblum, & Smith, 2006).

Globally mobile expatriates engage in international work that requires varying levels of human capital to be performed. A low level of human capital is required to perform international work involving simple jobs. In contrast, professional jobs require employees to engage in complex international work, which requires high levels of human capital to be completed successfully. The combination of these two dimensions yields my proposed typology of globally mobile workers shown in Figure 1.1 below.

Figure 1.1 Typology of Globally Mobile Workers

		Human Capital	
		Low	High
Personal Initiation	High	<i>Self-initiated Expatriate Workers</i>	<i>Self-initiated Expatriate Professionals</i>
	Low	<i>Refugee Migrant Workers</i>	<i>Assigned Expatriates</i>

In the subsequent section, I focus on the upper left quadrant of my proposed typology to review the past reviews of research on self-initiated expatriates.

Reviewing the Reviews of SIE Studies

In this first section, I conduct a review of the reviews of SIE studies that have been published in the past two decades. Upon my initial screening of the SIE literature, I identified 32 studies as candidate reviews. My close reading of these 32 manuscripts revealed that 23 manuscripts should be retained, as they provided both a general review of the expatriate literature and a specific review of the SIE literature (see Appendix A for full list of both retained and rejected reviews).

My coding of the reviews indicated that most of the review manuscripts (78%) contained some type of comparison between SIEs, AEs, and/or Migrants. Only nine (39%) of the studies developed a framework of SIE/expatriate types, while ten studies (43%) provided their classification or categorization. The authors developed a typology or taxonomy in five (22%) of the reviews, whereas in 57% of the reviews, the specific set of articles from which conclusions were drawn was not disclosed. The authors of the remaining substantive reviews and systematic reviews reported that their findings were an amalgamation in the range between 21-290 studies. Additionally, 70% of the studies did not incorporate a guiding theory, while the remaining 30% of the studies used a variety of theoretical frames including career capital theory, career theory, human capital allocation theory, ecosystem theory, psychological contract theory, agency theory, personal initiative theory, and conservation of resources theory (see Table 1.1).

Table 1.1 Previous SIE Reviews

<i>Article</i>	<i>Comparison</i>	<i>Framework</i>	<i>Classification/ Categorization</i>	<i>Taxonomy /Typology</i>	<i>Theory</i>
Al Ariss, A., Koall, I., Ozbilgin, M., Suutari, V., Cao, L., Hirschi, A., & Deller, J. (2012). Self-initiated expatriates and their career success. <i>Journal of Management Development</i> .	Yes	Yes	X	X	Career Capital Theory

Shaffer, M. A., Kraimer, M. L., Chen, Y. P., & Bolino, M. C. (2012). Choices, challenges, and career consequences of global work experiences: A review and future agenda. <i>Journal of Management</i> , 38(4), 1282-1327.	Yes	Yes	Yes	Yes	No guiding theory
Berry, D. P., & Bell, M. P. (2012). 'Expatriates': gender, race and class distinctions in international management. <i>Gender, Work & Organization</i> , 19(1), 10-28.	Yes	X	X	X	No guiding theory
Doherty, N. (2013). Understanding the self-initiated expatriate: A review and directions for future research. <i>International Journal of Management Reviews</i> , 15(4), 447-469.	Yes	Yes	X	X	No guiding theory
Akram, A. A., & Crowley-Henry, M. (2013). Self-initiated expatriation and migration in the management literature. <i>Career Development International</i> , 18(1), 78-96.	Yes	Yes	X	X	No guiding theory
Doherty, N., Richardson, J., & Thorn, K. (2013). Self-initiated expatriation and self-initiated expatriates. <i>Career Development International</i> .	Yes	X	Yes	X	Career Theory
Tharenou, P. (2013). Self-initiated expatriates: an alternative to company-assigned expatriates?. <i>Journal of Global Mobility</i> .	Yes	Yes	X	X	Career capital theory, human capital allocation theory
Arp, F., Hutchings, K., & Smith, W. A. (2013). Foreign executives in local organisations. <i>Journal of Global Mobility</i> .	Yes	X	Yes	X	(Theory Construct ion)
Arp, F. (2013). Typologies: What types of foreign executives are appointed by local organisations and what types of organisations appoint them?. <i>German Journal of Human</i>	Yes	X	Yes	Yes	(Theory Construct ion)

<i>Resource Management</i> , 27(3), 167-194.					
Andresen, M., Bergdolt, F., Margenfeld, J., & Dickmann, M. (2014). Addressing international mobility confusion—developing definitions and differentiations for self-initiated and assigned expatriates as well as migrants. <i>The International Journal of Human Resource Management</i> , 25(16), 2295-2318.	Yes	Yes	Yes	Yes	No guiding theory
Cerdin, J. L., & Selmer, J. (2014). Who is a self-initiated expatriate? Towards conceptual clarity of a common notion. <i>The International Journal of Human Resource Management</i> , 25(9), 1281-1301.	Yes	X	Yes	X	No guiding theory
Przytuła, S. (2015). Migrants, assigned expatriates (AE) and self-initiated expatriates (SIE)- Differentiation of terms and literature-based research review. <i>Journal of Intercultural Management</i> , 7(2), 89-111.	Yes	X	X	X	No guiding theory
Tharenou, P. (2015). Researching expatriate types: the quest for rigorous methodological approaches. <i>Human Resource Management Journal</i> , 25(2), 149-165.	Yes	X	X	X	No guiding theory
Vance, C. M., McNulty, Y., Paik, Y., & D'Mello, J. (2016). The expat-preneur: conceptualizing a growing international career phenomenon. <i>Journal of Global Mobility</i> .	Yes	X	Yes	X	No guiding theory
Farcas, D., & Gonçalves, M. (2016). Do three years make a difference? An updated review and analysis of self-initiated expatriation. <i>SpringerPlus</i> , 5(1), 1326.	Yes	X	X	X	No guiding theory
Baruch, Y., Altman, Y., & Tung, R. L. (2016). Career mobility in a global era: Advances in managing expatriation and repatriation.	Yes	Yes	X	X	Ecosystem Theory

<i>Academy of Management Annals</i> , 10(1), 841-889.					
McNulty, Y., & Vance, C. M. (2017). Dynamic global careers: A new conceptualization of expatriate career paths. <i>Personnel Review</i> .	X	X	Yes	X	Psychological Contract Theory, Agency Theory
Selmer, J., Andresen, M., & Cerdin, J. L. (2017). Self-initiated expatriates. In Research handbook of expatriates. <i>Edward Elgar Publishing</i> .	X	X	X	X	No guiding theory
Andresen, M., Dickmann, M., & Suutari, V. (2018). Typologies of internationally mobile employees. In <i>The Management of Global Careers</i> (pp. 33-61). Palgrave Macmillan, Cham.	X	X	X	Yes	No guiding theory
Hajro, A., Stahl, G. K., Clegg, C. C., & Lazarova, M. B. (2019). Acculturation, coping, and integration success of international skilled migrants: An integrative review and multilevel framework. <i>Human Resource Management Journal</i> , 29(3), 328-352.	Yes	Yes	X	X	No guiding theory
Conrad, H., & Meyer-Ohle, H. (2019). Overcoming the ethnocentric firm?—foreign fresh university graduate employment in Japan as a new international human resource development method. <i>The International Journal of Human Resource Management</i> , 30(17), 2525-2543.	X	Yes	Yes	X	No guiding theory
Andresen, M., Pattie, M. W., & Hippler, T. (2020). What does it mean to be a ‘self-initiated’ expatriate in different contexts? A conceptual analysis and suggestions for future research. <i>The International Journal of Human Resource Management</i> , 31(1), 174-201.	X	X	X	X	Personal initiative theory, conservation of resources theory

Harrington, B., & Seabrooke, L. (2020). <i>Transnational professionals. Annual Review of Sociology</i> , 46.	Yes	X	Yes	X	No guiding theory
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In the remaining part of this section, I provide a brief narrative review of each of the above 23 review articles. Al Ariss, Koall, Ozbilgin, Suutari, Cao, Hirschi, and Deller (2012) provide a comprehensive review of the SIE literature with the aim to identify the distinguishing characteristics of SIEs, AEs, and skilled migrants, as well as to develop a conceptual framework that can be used to examine SIEs' career success. In the subsequent review, Shaffer, Kraimer, Chen, and Bolino (2012) examine the choices, challenges, and career consequences of individuals possessing global work experience. The authors proposed a classification system that synthesizes the literature related to both assigned and self-initiated expatriates, as well as to alternative types of global travelers such as short-term assignees, flexpatriates, and international business travelers. The dimensions of their classification system are: the definition, purpose, duration, location, relocation, compensation, repatriation, international human resource management involvement, advantages, and disadvantages of each type of global traveler. In addition to proposing the classification, the authors offer a framework for relating global work experience to career choices (e.g., external and internal influences), career challenges (e.g., personal, work, and nonwork demands), and career consequences (e.g., intrinsic and extrinsic career success). In addition, the authors develop a taxonomy of global work experiences which incorporates the high and low levels of physical mobility, cognitive flexibility, and non-work disruption associated with the different types of work.

In the subsequent review, Berry and Bell (2012) take a critical stance when comparing the use of the terms "expatriate" and "migrant" in the international management literature arguing the term "expatriate" is "normalized to produce and reproduce inequality and privilege

across borders" (p.3). The authors develop a chart comparing studies that focus on expatriates and the studies that focus on migrants to accentuate differences across the dimensions of gender, race/ethnicity, employers and industries, sample of occupations, gender makeup, skill level, compensation and benefits, and organizational support. Later, Doherty (2013) reviewed 49 SIE studies published from 1997 through 2011 to synthesize their findings in the form of a framework that takes into account the study's level of analysis (micro, meso, and macro), and to emphasize the distinction between company-assigned expatriates and SIEs.

In their systematic review and analysis of the SIE literature, Al Ariss and Crowley-Henry (2013) propose a definition for SIEs and provide a comparison between SIEs and migrants along eight characteristics. Additionally, the authors identify 28 themes permeating the SIE literature and outline a map for further research of SIEs. In their review, Doherty, Richardson, and Thorn (2013) apply Suddaby's (2010) four elements of construct clarity to the SIE construct and produce a classification chart outlining seven forms of global mobility specified along nine dimensions.

In Tharenou's (2013) conceptual review of 21 studies, the author compared SIEs, AEs, and host-country national employees of multinational corporations. This study examined critically the taken-for-granted assumption that SIEs can be a suitable alternative for AEs. A framework for assessing self-initiated expatriates as an alternative to traditional expatriates was proposed, as well as a framework to assess the fit between expatriate career capital competencies (knowing-how, knowing-who, knowing-why) and their employment types (SIE, AE, MNC local employees).

Arp, Hutchings, and Smith (2013) reviewed the extant literature on expatriate assignments and SIEs, as well as conducted an exploratory qualitative study that resulted in their

proposal of a new category of foreign expatriate, which they labeled the foreign executive in local organizations (FELOs). As an extension of this proposal, Arp (2013) conducted an additional study to understand both the types of foreign executives that are appointed by local organizations and the organizations that appoint them. The outcome are two typologies/taxonomies which outline four different types of FELOs and three different types of local organizations.

The systematic review of assigned/self-initiated expatriates and migrants conducted by Andresen, Bergdolt, Margenfeld, and Dickmann (2014) yielded a typology of four different expatriate types, as well as a decision tree that can be used to distinguish migrants from non-migrants. Furthermore, the authors propose the rubicon model of action phases which details the choice, pre-action, action, and evaluation phases associated with an individual's decision to expatriate.

Upon reviewing the SIE definitions found in the literature, Cerdin and Selmer (2014) propose a new unifying definition of SIEs. Specifically, four conceptual criteria (self-initiated international relocation, regular employment, intentions of a temporary stay, and skilled/professional qualifications) are used in the definition with the aim to delineate SIEs from other expatriate types. Similarly, Przytula (2015) reviewed the literature on migrants, assigned expatriates, and self-initiated expatriates to synthesize the differentiating criteria between these three groups, and to propose definitions for each group.

Tharenou (2015) reviewed 290 published manuscripts that included studies of international assignees, skilled immigrants, and self-initiated expatriates. The author compared the significant differences in research designs of the studies of expatriate types to propose definitions for each type. In Vance, McNulty, Paik, and D'Mello's (2016) review, they proposed

a new category of an expat-preneur. Farcas and Goncalves (2016) conducted a systematic review of the studies conducted over the previous three years with the goal to update Doherty's (2013) systematic review. In this updated review, the similarities and differences between SIEs and AEs are revisited and accompanied with a comparison of the of the studies conducted at the micro, meso, and macro levels of analysis. Additionally, the authors synthesized the 45 SIE articles that were published between 2012 and 2014 by providing each study's focus, methodology, findings, and future suggestions.

At the same time, Baruch, Altman, and Tung (2016) systematically reviewed the extant literature on expatriation, repatriation, and self-initiated expatriation. These authors proposed that the study of expatriates and other globally mobile groups should be framed within the career ecosystem framework, as it reflects a wider social-economic perspective. The authors also develop an overarching framework for expatriation and repatriation, as well as a process model and a theoretical synthesis of extant studies.

In their review, McNulty and Vance (2017) propose a new conceptualization of expatriate career paths arguing that global careers unfold through an AE-SIE career continuum, which varies in terms of the line of individual/company control. The authors illustrate the application of their proposed continuum by categorizing the following eight types of expatriates: parent-country nationals, third-country nationals, expatriates of host-country origin/returnees, foreign executives in local organizations, permanent transferees, reverse expatriates, localized expatriates, and expat-preneurs.

Selmer, Andresen, and Cerdin (2017) review the different ways in which SIEs have been defined by focusing on the self-starting, proactive, and persistent elements of self-initiation, arguing that these elements have functional value for SIEs in their international contexts of work.

The authors also explore how time, motivation, and career can impact SIEs, as well as outline the main characteristics of the internationally mobile talent pool. Taking a different approach, Andersen, Dickmann, and Suutari (2018) examine the typologies of internationally mobile workers based on Asendorph and Neyer's (2012) general criteria (explicitness, consistency, completeness, parsimony, productivity, and applicability) and empirical anchoring and empirical verifiability criteria used to the characteristics for differentiating internationally mobile employee types.

Hajro, Stahl, Clegg, and Lazarova (2019) reviewed the expatriate literature (including both AE and SIE) and identified how examinations at the individual, organizational, and societal levels can be meaningfully applied to the population of internationally skilled migrants (ISMs). The differences among AEs, SIEs, and ISMs in the dimensions of time horizon, geographic origin, destination, motivation, personal agency, organizational support, vulnerability, status, and power, as well as the commonly studied outcomes, were highlighted. Additionally, a multilevel framework of ISMs' acculturation modes, coping effectiveness, and integration success was developed.

In Conrad and Meyer-Ohle's (2019) review, the authors identify foreign fresh university graduates (FFGs) as a new category of international talent. They also propose a new framework that allows for the evaluation of the viability of the international personnel development method utilized in Japanese firms. The framework takes into account the diversity of the workforce and takes into account how the employment practices are distinct at the headquarters versus subsidiaries.

Andresen, Pattie, and Hippler (2020) systematically reviewed the SIE literature and found that the concept of initiative has not been thoroughly integrated into the SIE domain.

Therefore, the authors applied the theory of personal initiative to the study of SIEs, addressed the sampling issues found in the literature, and explicated how employee initiative adds value to MNCs. They also proposed a research model which highlights how the self-starting, proactive, and persistent elements of SIE's personal initiative are related to performance, job satisfaction, adjustment, and employability outcomes.

Harrington and Seabrooke (2020) reviewed the sociological literature on transnational professionals and developed a classification of professions based on across/within nations/organizations dimensions. Additionally, the authors proposed an occupational hierarchy based on autonomy and conceptual abstraction of the knowledge base, whereby transnational professionals hold the highest position, followed by state-licensed professionals, and ending with guild/union occupations.

In the subsequent sections, I derive insights from the above summarized 23 reviews to respond to Doherty's (2013), call to meet the "need to connect the studies and the implications of the findings within a frame of reference that facilitates a more coherent approach to future research" (p. 459). Not only that I provide an updated review of all SIE literature, but also, I develop an integrated pictorial representation of the nomological network of the SIE construct. I also uniquely contribute to the SIE literature not only by updating the conversation related to the definition of self-initiated expatriates, but also by developing a new unifying definition employing a novel method.

Reviewing Origins of SIE Research

Prior to 1997 the research studies of expatriates had been focused primarily on assigned expatriates (AEs) because that type had been the dominant type of expatriate employed by multinational organizations. However, the findings of these studies did not seem to apply to

SIEs, a new type of expatriates who “self-initiate their international relocation, with the intentions of regular employment and temporary stay, and with skills/professional qualifications” (Cerdin & Selmer, 2014, p.1293). Therefore, researchers began to study SIEs as a group distinct from AEs.

The seminal academic research study addressing SIEs was conducted by Inkson, Arthur, Pringle, and Barry (1997). These authors examined the overseas experiences (OE) of young people traveling from New Zealand to other developed countries for leisure, internships, and working vacations. The subsequent research studies examining the OE phenomenon were therefore focused exclusively on young individuals, many of whom moved overseas upon graduating from a university in New Zealand due to the lack of entry level job opportunities available in their island nation. The term “the big OE” is a common phrase that connotes social success in New Zealand for those who can undertake their own OE aiming to obtain a higher social status over those who are not able to secure the overseas experience. The OE is viewed among educated young people in New Zealand as “a rite of passage, a symbol of adulthood, a social norm, a source of pride, and an experience which provides common conversational currency among those who take it” (Inkson & Myers, 2003, p. 171).

Originally, most of the New Zealanders engaging in the big OE ended up living in London, as they took advantage of the ‘working holiday’ visa provision issued by the United Kingdom (Inkson & Myers, 2003). London’s centrality within UK and Europe, along with the extensive social network of New Zealanders within this metropole, provides to young graduates coming from New Zealand many work and leisure opportunities. Overall, while the OE taken by young New Zealanders may have some idiosyncratic elements, it connotes a broader meaning because “it is in essence a local expression of the ‘backpacker culture’ increasingly in evidence

among young people from countries around the world” (Inkson & Myers, 2003, p. 172). In other words, the research on SIEs originated from the investigations of the OE phenomenon of young New Zealanders.

Reviewing the Efforts of Defining Self-Initiated Expatriates

Expatriates engage in international work that requires varying aspects of engagement (Mayrhofer, Reichel, & Sparrow, 2012). In one aspect, the international work performed by expatriates may be either primarily non-business-related, such as the work in governmental agencies, non-governmental organizations, asylum, globetrotting, sabbaticals, and various forms of immigration, or primarily business-related when such work is performed by assigned expatriates, off-shore transferees, short-term assignments, cross-border employees, and virtual global employees (Baruch & Dickmann, 2011).

The international work performed by business expatriates is commonly performed either by assigned expatriate (AE) or by self-initiated expatriate (SIE). Five types of AEs have been identified in the extant literature: parent-country nationals, third country nationals, inpatriates, short-term assignees, and host-country assignees (McNulty & Brewster, 2017; Aycan & Kanungo, 1997; Harrison, Dodd, & Chinyamurindi, 2004; Tan & Mahoney, 2006; Shaffer et al., 2012). McNulty and Brewster (2017) have attempted to integrate the definition of a business expatriate:

Legally working individuals who reside temporarily in a country of which they are not a citizen in order to accomplish a career-related goal, being relocated abroad either by an organization, by self-initiation or directly employed within the host-country (p.32).

However, this general definition has not been accepted among most researchers studying SIEs, thus engendering the lack of consensus about the definition of SIEs. Therefore, Cerdin and Selmer (2014) proposed four criteria that should underlie a unified definition of a SIE: “(a) self-

initiated international relocation, (b) regular employment (intentions), (c) intentions of a temporary stay, and (d) skilled/professional qualifications.” Based on these criteria, these authors defined SIEs as “expatriates who self-initiate their international relocation, with the intentions of regular employment and temporary stay, and with skills/professional qualifications” (Cerdin & Selmer, 2014, p.1293). While this definition did resonate with some SIE researchers, it did not garner full support by the research community, thus becoming the last failed attempt to unify the SIE definition.

Multiple failed attempts to formalize the definition of a self-initiated expatriate (Arp, Hutchings, & Smith, 2013) motivated Doherty, Richardson, and Thorn (2013) to concede that, “we do not purport to have a prescriptive definition of SIE.” To unpack this definitional ambiguity that can be likely attributed to the nascent stage of the research domain, I have extracted the definitional terms of SIEs while tracing the evolution of the research of SIEs since the late 1990s when Inkson, Arthur, Pringle, and Barry (1997) examined the Overseas Experience (OE) of young New Zealanders defined as, “A personal odyssey, initiated and resourced by the self” (Inkson et al., 1997). While the New Zealand OE, typified by young adults leaving their home country to engage in odyssey and exploration for an unspecified amount of time might be considered a type of SIE, this distinct population does not represent the typical subjects found in SIE research studies that have been conducted over the past two decades.

In the early 2000s, researchers examining different kinds of SIEs proposed several definitional terms for this specific group of expatriate workers. For example, at the beginning of the 21st century Suutari & Brewster (2000) introduced a compound term ‘Self Initiated Foreign Work Experience’, which was the first to include the term “work” into the definition of this group of international workers. The following year, Bhuian, Al-Shammari, & Jefri (2001)

introduced contractual employment in their definition of Self-initiated Overseas Expatriates. Several alternative terms were later used in the SIE literature, such as Self-initiated expatriates (Lee, 2005), Self-initiated Foreign Experience (Vance, 2005), Self Initiated Foreign Experience (Myers & Pringle, 2005), Self-directed Expatriates (Richardson & McKenna, 2006), Non-Corporate-Sponsored Expatriates (Bozionelos, 2009), Self-Initiated Foreign Experiences (Thorn, 2009), Self-Initiated Foreign Employee (Yijala, Jasinskaja-Lahti, Likki, & Stein, 2012), Corporate Self-Initiated Expatriate (Altman & Baruch, 2012), Foreign Executives in Local Organizations (Arp, 2012), and Organizational Self-initiated Expatriates (Richardson & McKenna, 2014) (See Table 1.2).

Table 1.2 SIE Terms Introduced Over Time

Term	Authors	Year
<i>Big OE</i>	Inkson, Arthur, Pringle, & Barry	1997
<i>Self Initiated Foreign Work Experience</i>	Suutari & Brwester	2000
<i>Self-initiated Overseas Expatriate</i>	Bhuiyan, Al-Shammari, & Jefri	2001
<i>Self Initiated Foreign Experience</i>	Myers & Pringle	2005
<i>Self-directed Expatriates</i>	Richardson & McKenna	2006
<i>Non-Corporate-Sponsored Expatriates</i>	Bozionelos	2009
<i>Self-Initiated Expatriate</i>	Richardson et al	2010
<i>Corporate Self-Initiated Expatriate</i>	Altman & Baruch	2012

The need to integrate the multiplicity of these compound terms was addressed by the researchers at the “Self-initiated Expatriation and Career Development: Diversity Across Cultures and Genders” symposium held at the Academy of Management conference in 2010. The consensus among the majority of the authors contributing to the SIE literature at the time was reached for the term “Self-initiated Expatriate”, which was suggested to be collectively adopted and used to identify this group of expatriates. The prominent SIE authors, who took part in that symposium and promoted the adoption of this common term, were Al Ariss, Bozionelos,

Chauderlot, Crowley-Henry, Doherty, Inkson, McKenna, McNulty, Myers, Pringle, Richardson, Tharenou, and Vance.

Although during the 2010 Academy of Management symposium the consensus to adopt the compound term ‘self-initiated expatriate’ was reached, the agreement about which SIE definitional elements should be adopted was not made. The variety of definitional elements that have been included in the definition of SIEs are shown in the Table 1.3 below that depicts the frequency at which each of the definitional elements has been used in published definitions of SIEs. I extracted these definitional elements from 130 journal articles identified in my systematic literature review (See Appendix B for complete list of SIE definitions containing these elements).

Table 1.3 SIE Definitional Elements

Definitional Elements	Frequency
Overseas - Internationally	58%
Work Motivation - Career Development - Regular employment	52%
Self-Initiation	43%
Not transferred/assigned by org.	34%
Leaves somewhere	32%
Self-Financed Launch	22%
Choose country	19%
Not Defined	18%
Seek - Search	12%
Undefined period of time before return	12%
contractual basis	12%
Tourism - Cultural Experience	9%
Personal Development	8%
Professionals - Managers	8%
Live	8%
Voluntary	6%
Temporary Stay	5%
Travel	5%
Autonomy	5%
Long term - (over a year)	4%

Host country contract	3%
Exploration Focused	2%
Migrate - Migrant	2%
Foreign National	2%
New Organization	2%
Odyssey - Adventure	2%
Hired by foreign companies	2%
New Location	2%
Education	1%
Family Benefit	1%
Improvised Employment	1%
Involuntary	1%
Significant cultural distance	1%
Scarce org. support	1%
Company Sponsored	1%

Review of SIE Definitions

My review of the SIE definitions revealed the presence of more than 30 different definitional elements. This diversity explains there is no agreed-upon standard definition of a self-initiated expatriate. My analysis also revealed that many of these definitional elements confounded antecedents and outcomes within the definition of SIEs. For example, several elements refer to motivations, which are antecedents. The most frequent motivational elements used in SIE definitions are those related to work, such as career development (Jannesari & Sullivan, 2019) and regular employment (Presbitero & Quita, 2017). Some other motivational elements are related to tourism, cultural experience, travel, exploration, and personal development (Hussain, Iren, & Rice, 2019; Selmer, McNulty, Luring, & Vance, 2018; Peiperl, Levy, & Sorell, 2014). As SIEs possess these motivations before engaging in their SIE experience, they are antecedents that should not be included in the definition of an SIE. Besides motivational elements, family benefit (Pieperl, Levy, & Sorell, 2014) has also been included as a

definitional element for SIEs. However, family benefit is a desired outcome from SIE that should not be included in the definition.

Curiously, the notion of self-initiation is not included in more than half of the past SIE definitions. Although, some researchers believe that this element is redundant because it is already contained in the compound term “self-initiated expatriate”, it is clear that there is no consensus about the need for an explicit inclusion of this term in the SIE definition. Other elements that are included in previous definitions of SIEs, which are not focal to a parsimonious definition of SIEs, include significant cultural difference between host country and home country, improvised employment, employment in a new organization, and the type of work performed. These elements are either antecedents, outcomes, moderators, or are not the factors that differentiate SIEs from other types of expatriates. In sum, the definitional inconsistency across SIE studies demonstrates the fragmentation and lack of construct clarity in this nascent field of SIE research.

It should be noted, however, this review is not the first to identify the inconsistencies among proposed SIE definitions. The need for SIE construct clarity and for narrowing the number of definitional elements was formerly accentuated by Cerdin and Selmer (2014) in their influential manuscript, “Who is a self-initiated expatriate? Towards conceptual clarity of a common notion.” I compared their proposed four critical elements of the SIE definition, “(a) self-initiated international relocation, (b) regular employment (intentions), (c) intentions of a temporary stay, and (d) skilled/professional qualifications” to the definitions contained in the 130 definitions in my analysis. I found that there is an agreement of relevance for the definitional elements related to the following terms: international (58%), work (52%), self-initiation (43%), and relocation (32%). However, I found that Cerdin and Selmer (2014) did not include the

following two specific elements that many other authors found critically important: not transferred or not assigned by their organization (34%) and self-funded relocation (22%). I also found that only a small percentage of articles cited temporary stay (5%) and skilled professional (8%) as requirements to be included in a definition of SIEs.

Nomological Network of the SIE Definition

To address the deficiencies of the definitional elements extracted from the SIE literature, I arranged the extant elements into the nomological network of the SIE definition (see Figure 1.2 below). The purpose of creating this nomological network is to identify the key inputs that are crucial to 1) understand the antecedents, moderators and outcomes related to SIEs; 2) provide a unifying definition of the SIE construct; and 3) propose a measurement tool that can be used to assess SIE status.

Figure 1.2 Nomological Network of SIE Definition



My study of the SIE definition, is grounded in the following two basic assumptions: 1) “Scientific fields can only progress if the phenomenon studied is defined precisely and the nature of the underlying phenomenon is unveiled without making for a tautological definition and estimation” (Antonakis, Bastardo, Jacquart, & Boas Shamir, 2016, p. 301), and 2) the

antecedents and outcomes of a construct cannot be used to define the construct itself (MacKenzie, 2003). These assumptions are relevant because several studies in the extant SIE literature include antecedents or outcomes in their SIE definition. Commonly included are the motivations that are either work-related (i.e., career development, protean career), tourism oriented (i.e., cultural experiences, travel, exploration), or related to perceived personal development. These motivations, which are antecedents because they precede an individual's international relocation, are neither exclusive to SIEs nor homogenous. Therefore, motivations cannot be used to define SIEs. In a similar vein, the included outcomes, such as experienced family benefits, regular employment, actual cultural experiences, and personal development, should not be definitionally confounded with the SIE construct itself.

I also observed that some studies included moderating variables within the SIE definition, specifically the moderating variables that moderate the relationship between SIEs and the related antecedents and outcomes. The first moderator, organizational support (or its absence), is frequently cited as a definitional element of self-initiated expatriation; however, there are multiple issues associated with using organizational support as a definitional element for SIEs. First, there are not only various degrees, but also various forms of support provided by an organization to SIEs. For instance, some SIEs are provided with pre-departure training, moving allowances, and pre-arranged mentors to help guide their adjustment to the new foreign country, organization, and culture. In contrast, some other SIEs, specifically those who self-finance their international move, are not provided with any special treatment or support in their new endeavor. Therefore, it would be more appropriate to think of organizational support as a continuous moderator reflecting the nature and the extent to which SIEs are supported by their organizations.

The second issue with organizational support is that it moderates the relationships between both antecedents and SIE variables and SIE variables and outcomes. On the one hand, the decision to become an SIE by an individual who is motivated by career development can be moderated by the level of organizational support provided by the organization. For example, an internal dialog such as, “will this organization provide support through the socialization, training and mentoring necessary to advance my career?” might influence the individual’s decision to become an SIE. On the other hand, organizational support in the form of language training or company-sponsored childcare could impact outcomes, such as family benefit and personal development. Therefore, organizational support should not be included as a definitional element in the SIE definition because it is a moderating variable for both antecedents and outcomes of SIE. Some other moderating variables that should not be included in the SIE definition are: cultural differences, new location/organization, employment contract, and time period. Therefore, based on my comprehensive analysis of SIE definitions, I propose the following succinct definition for an SIE from which the related antecedents, outcomes and moderators are removed, **“An SIE is a foreign national who agentically self-initiates an international change in their dominant place of residence for the purpose of work.”**

In the remaining part of this section, I provide explanation and justification for each element of my proposed definition. The first element in my proposed definition is “foreign national.” This element is necessary because it describes the nature of an expatriate’s nationality. In other words, expatriates are not individuals that come from the country in which they live and work. The second term is “agentically” which connotes the condition under which an individual decides to “self-initiate” a move abroad. Specifically, this means that the SIE was not influenced to relocate by any environmental pressure imposed from external forces. The “international

change” element indicates that the move occurred across national boundaries, while the “dominant place of residence” means that the move impacts the location of the individual’s sustained daily activities. The final element, “for the purpose of work”, indicates that the purpose of SIEs is related to work in a multinational organization. In other words, studying vacationers and travelers is useful in some domains, but in the SIE domain, it is most common to examine how SIEs relate to multinational organizations as employees and managers, not as customers.

Based on my proposed definition, the following 4-item measurement tool can be examined in future research studies to assess participant’s SIE status: 1) are you a foreign national, 2) was the decision to move and work abroad initiated internally by yourself or was it initiated by an external source, 3) has your dominant place of residence changed to an international location, 4) are you working or do you intend to work in your new international location. Now that I have proposed a new unified definition of SIE and proposed a related measurement tool, I examine the validity of my new definition by applying a method that accounts for the evolution of in the definitional elements over time.

Tracing the Evolution of the SIE Definition Over Time

My systematic review of SIE definitions, following other exemplary systematic reviews that aim to contribute uniquely to the literature by employing innovative conceptualizations and methodologies (Breslin, Gatrell & Bailey ,2020), gives primacy to analysis over description (Jones & Gatrell, 2014). The main focus of my systematic review is on theoretical development by way unifying the SIE definition, which is a kind of construct clarification. Specifically, I utilize an analytical approach to unifying the SIE definition in order to “locate potential ambiguity around a construct and provide construct clarification” (Post, Sarala, Gatrell, & Prescott, 2020, p. 355), framing novel trajectories for future research.

To derive and validate the unified SIE definition, I combined my systematic review of SIE definitions with a novel computational method for discerning the structure of concepts such as the SIE concept (de Bolla, Jones, Nulty, Recchia, & Regan, 2019). First, by conducting my systematic review of SIE definitions, we identified the key definitional elements that emerged, disappeared, or survived over time. Upon our close reading of these elements we synthesized our proposed unified SIE definition. Second, to validate my proposed SIE definition, I applied the computational method that creates a measure of lexical co-occurrences contained in the constellation of definitions over time. The purpose of this validation is to uncover the evolution of the structure of the SIE construct across different time periods.

The distributional concept analysis is the method that helped me to unpack the constellations of the key words comprising the SIE concept. The method uses a measure of the co-occurrences of the words that compose the SIE concept in a coherent manner. By employing this method, I have identified the key words that over time have provided conceptual coherence to the SIE definition whose constellation of words has evolved over its three stages of the SIE construct development. As a result, I was able to assess the extent of the overlap of the identified key words with the identified SIE definitional elements based on my systematic review of SIE definitions. The high level of overlap indicated that my proposed SIE definition was valid.

Overall, my primary aim in employing the two combined methods was to uncover the structural elements of the SIE concept, which signal the SIE definition. This way of combining the methods to search and analyze the data reveals new ways of knowing the past and the present of the SIE concept as it is shared in the SIE scholarly community. What I have revealed is whether the words, which express the SIE concept in a meaningful way, have changed in and across the different stages of its evolution. The meaningful use of the SIE concept as a

definitional envelope of the related key words, revealed how the SIE scholars think about this distinct type of expatriation. Therefore, my pursuit of the goal to unify the SIE definition is important because it provides a blueprint for researchers examining this type of expatriation practice. The extent to which my proposed unified SIE definition will be stable in the future as a blueprint for the SIE researchers will depend on whether and how the internal structure of the SIE definition will activate or deactivate the links with the key definitional elements.

Overview of Lexical Analysis used to Clarify the SIE Construct

My systematic review of SIE definitions, conducted by following the format of other exemplary systematic reviews that aim to contribute uniquely to the literature by employing innovative conceptualizations and methodologies (Breslin, Gatrell & Bailey ,2020), gives primacy to analysis over description (Jones & Gatrell, 2014). The main focus of my systematic review is on theoretical development aimed at unifying the SIE definition as a form of construct/concept clarification. Specifically, I utilize an analytical approach to unifying the SIE definition in order to “locate potential ambiguity around a construct and provide construct clarification” (Post, Sarala, Gatrell, & Prescott, 2020, p. 355), as well as to frame novel trajectories for future research.

To derive and validate the unified SIE definition, I combined my systematic review of SIE definitions with a novel computational method for discerning the structure of concepts, such as the SIE concept (de Bolla, Jones, Nulty, Recchia, & Regan, 2019). First, by conducting my systematic review of SIE definitions, I identified the key definitional elements that emerged, disappeared, or survived over time. Upon my close reading of these elements, I synthesized my proposal for a unified SIE definition. Second, to validate my proposed SIE definition, I applied the computational method that uses a measure of lexical co-occurrences contained in the

constellation of definitions over time. The purpose of this definitional validation is to uncover the evolution of the structure of the definition of the SIE construct across different time periods.

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following section, I describe the distributional concept analysis of SIE definitions that I conducted.

Distributional Concept Analysis of SIE Definitions

My analysis indicated that the concept of self-initiated expatriates has been changing over time, as it is reflected in the embedded “constellations” of its definitional elements and the related terms (de Bolla, Jones, Nulty, Recchia, & Regan, 2019). To uncover how the conceptualization of SIEs has changed over time, I applied distributional concept analysis that was proposed in 2019 by Peter de Bolla from the University of Cambridge, Ewan Jones from the University of Cambridge, Paul Nulty from University College Dublin, Gabriel Recchia from the University of Cambridge, and John Regan from the University of London. This analysis was conducted on the full set of the SIE definitions that have been proposed over time. Specifically, I use this method of analyzing the history of the SIE concept by focusing on the diachronic analysis of word distributions seeking to reveal the underlying structures of conceptual operations.

To conduct this analysis, first, I collected the SIE definitions from all the articles included in my systematic review (see Appendix B for the full set of SIE definitions). Second, I classified the definitions into three historical periods based on their year of publication. The first historical period of SIE research contained studies that were published from 1997 through 2013. The nascent period of the SIE domain ended with the publication of the first special issue of the SIE phenomenon in *Career Development International* in 2013 (Doherty, Richardson, & Thorn, 2013). The growth period of the SIE domain continued from 2014-2017, and the current period covers the past few years of research.

Third, each definition was converted to an individual text file (.txt), as this is the format required for the Python script that I used for distributional concept analysis of SIE definitions. Fourth, the Python script “call_Counters.py” was adapted by Chad Diaz II from the code provided by Paul Nulty at the University of London and run on the .txt files which removed all the punctuation and subsequently activated the functions contained in the “Counters.py” code (see Appendix C for the code used in this analysis). Fifth, the results of the distributional probability factor analysis produced a list of lexical co-associations in the constellations of SIE definitions. Finally, I conducted this analysis for each of the three historical periods of SIE studies to compare and contrast the primary co-associations contained in the periodic lexical profiles to each other with the goal to uncover changes in the words of SIE definitions over time (see Table 1.4).

Table 1.4 Changes in SIE Verbal Constellations Over Time

Changes in SIE Verbal Constellation Over Time											
Phase 1 (1997-2013)				Phase 2 (2014-2017)				Phase 3 (2018-2020)			
Row Labels	Sum of Occurrences	From Phase 1 to Phase 2			Row Labels	Sum of Occurrences	From Phase 2 to Phase 3			Row Labels	Sum of Occurrences
career	31	Continue	Drop	Added	country	81	Continue	Drop	Added	abroad	27
contractual	31	Country	Career	International	employment	28	Individual	Country	Abroad	career	17
country	53	Employment	Contractual	Relocation	hired	32	Organization	Employment	Career	decide	19
employment	26	Hired	Overseas	Stay	individuals	55	Without	Hired	Decided	expatriation	20
hired	32	Individual	Parent	Temporary	international	30	Work	International	Expatriation	individuals	43
individual	51	Organization	Transferred	Without	organization	35		Stay	Initiative	initiative	14
organization	41		Work	relocation	relocation	28		Temporary	Move	move	20
overseas	35			stay	stay	37		Support	Support	organization	14
parent	30			temporary	temporary	53				support	17
transferred	30			without	without	33				without	18
Grand Total	360			work	work	46				work	27
				Grand Total	Grand Total	458				Grand Total	236

In the first time period of the SIE research (1997-2013), a total of 1,084 lexical co-occurrences were uncovered in the constellation of SIE definitions consisting of 380 different word pairs. In other words, between the years of 1997 to 2013, 380 word pairs appeared 1,084 times in the definitions of SIEs. For example, the word “career” appeared along with the word “development” five times among the definitions. Additionally, the words “experiences” and “pursue” each appeared four times with the word “career.” Furthermore, there were eleven words that appeared 31 times with the word “career” in the definitions of SIEs.

In order to understand which words were being used most often in past attempts to define SIEs, I focused on the top 10 co-occurrences in each of the three time periods. In the first time period, the top ten words (along with the number of co-occurrences) that co-occurred in the SIE definition constellations included “career” (31), “contractual” (31), “country” (53), “employment” (26), “hired” (32), “individual” (51), “organization” (41), “overseas” (35), “parent” (30), and “transferred” (30). These ten words were included in the co-occurrences of 360 pairs out of a total of 1,084 pairs. Put differently, 33% of the total number of co-occurrences in all SIE definitions included at least one of these words.

In the second time period (2014-2017), a total of 1,136 lexical co-occurrences were uncovered in the constellation of SIE definitions consisting of 436 different word pairs. Due to an equal number of co-occurrences in the 10th paring, I included the top 11 words with co-occurrences in the first and second time periods. In the second time period, the top 11 words included “country” (81), “employment” (28), “hired” (32), “individuals” (55), “international” (30), “organization” (35), “relocation” (28), “stay” (37), “temporary” (53), “without” (33), and “work” (46). These eleven words were included in the co-occurrences of 458 pairs, which made up 40% of all co-occurrences.

Several words were dropped from the top 10 co-occurrences and several words remained in the transition from the first to the second time periods. Words that stayed within the top ten in both time periods are “country”, “employment”, “hired”, “individual”, and “organization.” Words that were dropped from the list of pairings included “career”, “contractual”, “overseas”, “parent”, and “transferred.” Also, there were six words that were added to the list of top co-occurrences which included “international”, “relocation”, “stay”, “temporary”, “without”, and “work.” One additional observation is that the percent of total co-occurrences in which the top terms were included increased from 33% in phase one to 40% in phase two.

Moving on to the third time period, a total of 477 lexical co-occurrences were uncovered in the constellation of SIE definitions consisting of 206 different word pairs. The top eleven words that co-occurred in SIE the definition constellations included “abroad” (27), “career” (17), “decide” (19), “expatriation” (20), “individuals” (43), “initiative” (14), “move” (20), “organizational” (14), “support” (17), “without” (18), and “work” (27). These eleven words were included in the co-occurrences of 236 pairs, which made up 49% of all co-occurrences. The fact that the top words in each time period are increasingly being represented in the total number of co-occurrences suggests that the field of research is moving towards a consensus in understanding of how SIEs should be defined.

There were several words that changed and several that did not change from period two to period three. Words that did not change are “individual”, “organization”, “without”, and “work.” Words that were dropped from the list of pairings included “country”, “employment”, “hired”, “international”, “stay”, and “temporary.” However, the following seven words that were added to the list of top co-occurrences are “abroad”, “career”, “decided”, “expatriation”, “initiative”, “move” and “support.” The two words “individual” and “organization” remained in

the list of top co-occurrences in all three periods. Additionally, the word “career” dropped out of the list in the second period but returned in the third period. Moreover, the words “international”, “stay”, and “temporary” were each added in the second period but dropped before the third period.

I use this assessment of the historical evolution of the terms associated with the SIE concept to test the validity of my proposed definition of SIEs synthesized from the nomological network of SIE definitions. An insight into Table 1.4 indicates that my proposed synthesized definition resonates well with the historical conceptualization. Specifically, in the first period there are three elements that align with my proposed definition, in the second period there are 5 points of alignment, and in the third period, all seven elements are in alignment (see Table 1.5).

Table 1.5 Historical SIE Definition Development

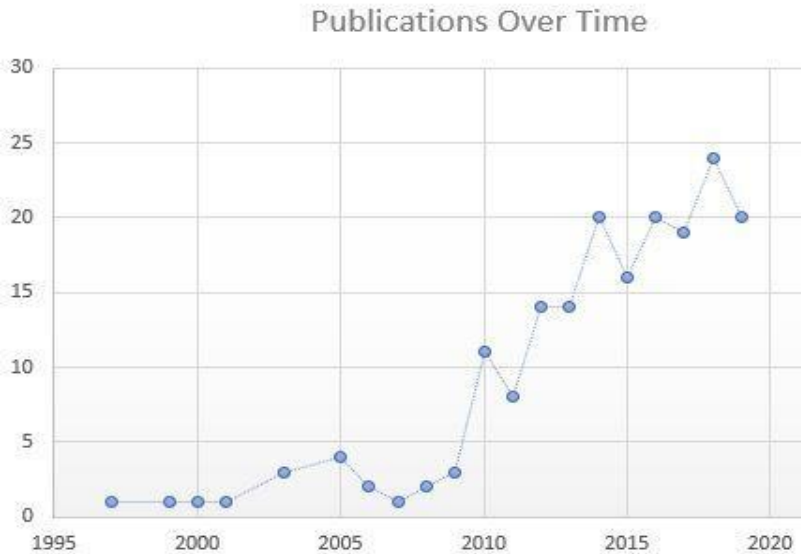
Historical SIE Definition Development			
My Proposed Definition	First Period	Second Period	Third Period
Foreign National	Individual	Individual	Expatriation
Agenticity			Decide
Self-initiate			Initiative
International	Overseas	International	Abroad
Change		Relocation	Move
Dominant place of residence		Stay	Move
Purpose of work	Employment	Work	Work

As I have developed and validated a unifying definition of SIEs, I provide a systematic literature review of SIE research in the subsequent section.

Systematic Literature Review of SIE Research

The need to conduct a systematic review of the burgeoning research on SIEs is justified by the exponential growth in the number of peer-reviewed articles published on SIEs over the past two decades (see Figure 1.3 for a visual depiction).

Figure 1.3 SIE Publications Over Time



Search Results

I conducted a systematic literature review of SIE studies published between 1997 and November of 2019 based on the search using the term “self-initiated expatriate”, as well as based on using eleven variations of this term (‘self initiated expatriate’, ‘self-initiated expatriation’, ‘self initiated expatriation’, ‘self propelled expatriation’, ‘self propelled expatriate’, ‘self directed expatriate’, ‘self directed expatriation’, ‘self initiated foreign workers’, ‘self initiated foreign employee’, ‘self initiated corporate employee’, ‘self initiated corporate expatriate’). I conducted the search in the SCOPUS, EBSCOhost, ProQuest, and PsycINFO databases. The search produced 875 total documents of various types (e.g., articles, book chapters, conference papers). After sorting for documents written in English, and after eliminating duplicate documents that had been identified across multiple databases, the search outcome was reduced to 316 publications. Table 1.6 depicts the types and number of documents identified in the systematic literature review search.

Table 1.6 Types of SIE Documents Found in Systematic Review

Document Type	COUNT
Journal Article	248

Feature	16
Dissertation	15
Book Chapter	14
Review	9
Conference Paper	4
Book	3
Editorial	3
Erratum	2
Article in Press	2
Grand Total	316

To add rigor to my systematic literature review, I removed dissertations, book chapters, conference papers, books and documents that were not published in peer-reviewed journals. This removal resulted in 181 quantitative and qualitative studies that were published as articles in peer-reviewed journals. In the process of reading and coding these 181 journal articles, I discovered in their references an additional six relevant articles that deserved to be included in the systematic literature review (see Appendix D for justifications of this inclusion).

Journals Publishing SIE Research and their Impact Factors

Studies that focus on the examination of SIEs are published in a wide variety of journals. However, 35% of all SIE articles are published in one of the following three journals: *International Journal of Human Resource Management*, *Journal of Global Mobility*, and *Career Development International*. In order to understand the level of influence that these journals possess, I conducted a journal impact factor analysis in which I included the number of articles published in each journal, the one-year and five-year impact factor reported in the 2017 Thomas Reuters Report, the journal assessment published in the VBH German research journal ranking database, and the latest, 3-year, and 5-year self-reported impact factor that was listed on each of the journals' websites in 2020 (see Table 1.7).

Table 1.7 Journal Impact Factor Ratings

Journal	#	From 2017 Thomas Reuters Report		From VHB Database	Self-Report from Journal Website		
		Impact Factor 2017	5-year impact factor	JHB	Latest Impact Factor	3-Year Impact Factor	5-Year Impact Factor
International Journal of Human Resource Management	28	2.425	2.709	B	3.15	2.71	3.46
Journal of Global Mobility	23	-	-	-	1.93	1.93	2.01
Career Development International	13	1.725	2.704	-	1.561	2.28	2.449
Journal of World Business	9	3.993	5.019	B	5.789	6.34	6.078
Thunderbird International Business Review	9	-	-	C	1.89	1.55	
Personnel Review	8	1.395	1.942	K.R	1.362	1.95	2.03
Asia Pacific Journal of Human Resources	4	1.163	1.563	-	0.891	1.58	1.51
International Studies of Management and Organization	4	-	-	C	1.49	1.46	
Journal of Management Development	4	-	-	-	1.69	1.73	
Cross Cultural Management	3	1.8	1.583	-	2.619		
Human Resource Management Journal	3	2.343	3.1	B	2.843	3.75	3.23
International Business Review	3	2.754	3.544	B	3.639	4.2	4.03
Asia Pacific Business Review	2	0.788	1.236	C	0.897		1.27
European Management Journal	2	2.369	3.412	B	2.985		3.61
European Management Review	2	1.25	2.095	B	1.6		2.59
Frontiers in Psychology	2	-	-	-	2.321		2.87
Human Resource Development International	2	-	-	K.R	1.98	1.72	
Human Resource Management	2	-	-	B	2.934	4.28	4.34
Human Resource Management Review	2	3.276	4.201	B	3.625	4.97	4.7
International Journal of Cross Cultural Management	2	-	-	K.R	1.34		
Journal of Pacific Rim Psychology	2	-	-	-	0.76		0.85
The International Journal of Human Resource Management	2	-	-	-	3.15		3.46

Academy of Management Annals	1	9.281	17.129	A	12.289	16.16	18.616
Academy of Management Journal	1	6.7	11.254	A+	7.191	10.36	11.891
British Journal of Management	1	3.059	3.625	B	2.982		4.62
British Journal of Middle Eastern Studies	1	-	-	-	0.662		0.75
Canadian Ethnic Studies	1	-	-	-	0.07		
Critical Perspectives on International Business	1	-	-	K.R	0.96	1.79	
Cross Cultural Management: An International Journal	1	1.8	1.583	C	1.34		1.58
Current Psychology	1	-	-	-	1.468		1.58

As expected for a field in its nascent stage, many of the journals in which SIE studies have been published do not have impact factors greater than 7.0 (Thomas Reuters) or an “A” rating (VHB). Two exceptions are Tharenou et al.’s (2010) study published in the *Academy of Management Journal*, and Baruch, Altman, and Tung’s (2016) study published in the *Academy of Management Annals*. (See Appendix E for the full list of journals and their associated impact factors.)

SIE Nomological Network Synthesized from My Systematic Literature Review

In order to analyze and synthesize the articles included in the systematic literature review, I sorted the 181 journal articles that I found in my search into quantitative (71) and qualitative/conceptual (110) types. I focused on the articles of the quantitative type and coded them based on the level of analysis examined in the studies and based on the theoretical frame applied. My goal was to synthesize the model that depicts the nomological network of conceptual interrelationships in the SIE literature. This nomological network of interrelationships in the SIE literature includes antecedent variables, at the individual and higher levels, moderating variables, at the individual and higher levels, as well as mediators and outcome variables. In the

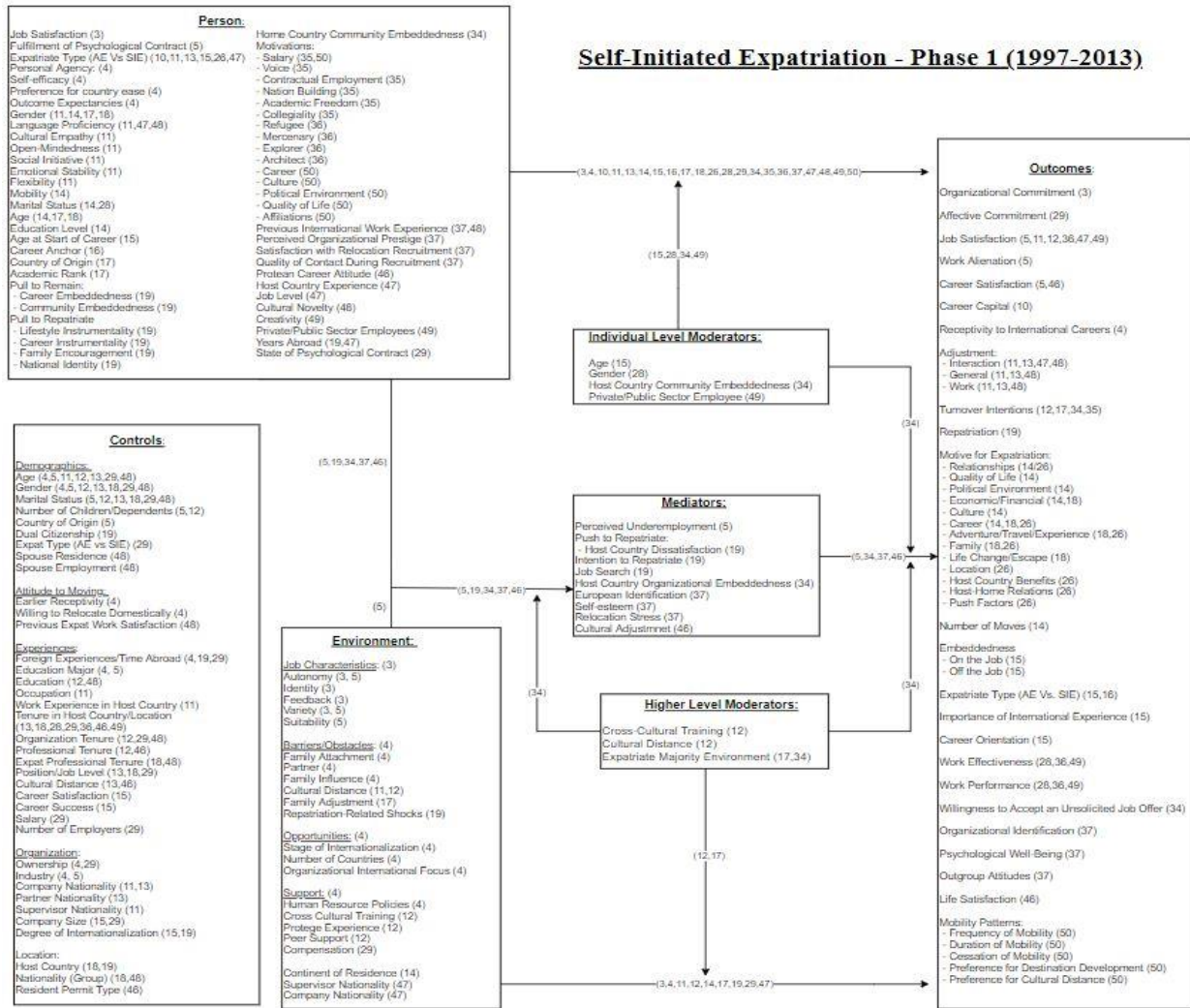
subsequent parts of this section, I describe and discuss the components of this model. To capture the evolution of the SIE research over time, I followed the periodization from the previous section of this Essay and divided up the total number of articles into three time periods reflecting the nascent stage (the first time period or Phase 1: 1997-2013), growth stage (the second time period or Phase 2: 2014-2017), and the recent maturing stage (the third time period or Phase 3: 2018-2020). Phase 1 includes the seminal articles and the subsequent articles published up through the first set of SIE reviews conducted in 2013 (Doherty, 2013; Akram & Crowley-Henry, 2013; Doherty, Richardson, & Thorn, 2013; Tharenou, 2013; Arp, Hutchings, & Smith, 2013; Arp, 2013). Phase 2 includes the articles published in the growth stage of the literature until 2017; while Phase 3 includes those articles published during the 2018-2019 time period. In the paragraphs below, I provide a broad narrative review of the quantitative studies included in the nomological network for each phase in the evolution of the SIE literature, which is depicted in Figure 1.4 – 1.6.

Phase 1

The studies in Phase 1 of the SIE research evolution focused mainly on the examination of individual level antecedents and their outcomes. These studies relied heavily upon correlational analysis which revealed the relationships between individual level constructs, such as motivations, expatriate type (AE vs. SIE), demographic variables, and experiences with outcome variables, such as job satisfaction, adjustment, turnover intentions, motivations for expatriation, and mobility patterns (see Figure 1.4). Ten studies published in this Phase 1 incorporated contextual antecedents related to job characteristics, barriers, obstacles, opportunities, and support; four studies tested mediation effects; while six studies tested moderating effects at either the individual level or contextual level. Overall, the majority of the

studies in this nascent stage of the SIE evolution relied heavily upon simple study designs that incorporated elementary forms of statistical analysis (i.e., correlations & ANOVA).

Figure 1.4 Systematic Literature Review Model – Phase 1

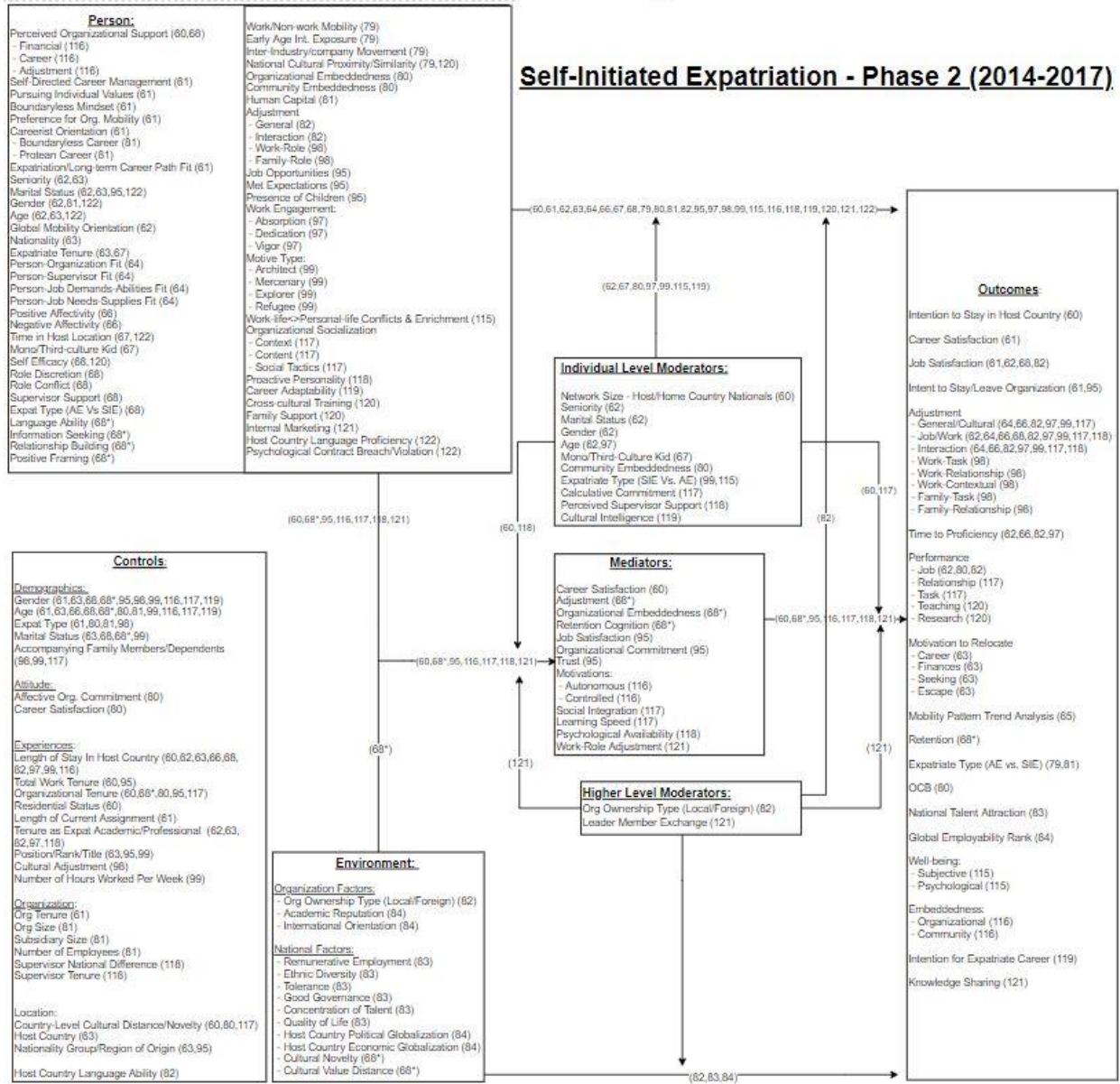


Phase 2

In Phase 2 of the SIE research evolution, researchers continued to conduct studies examining the relationships between individual level antecedents, such as perceived organizational support, boundaryless mindset, personality variables, while including intrapersonal and interpersonal variables that were related to outcome variables, such as retention, well-being, performance (job, task, teaching, and research), and adjustment (general,

cultural, job, work, interaction, etc.). In this Phase 2, researchers introduced a number of national-level antecedent variables, such as concentration of talent, cultural novelty, cultural value distance, and the extent of political/economic globalization. The increased complexity of study designs and analytical methods employed in this Phase 2 is evidenced by the growing use of mediating variables, such as career satisfaction, organizational commitment, trust motivation, social integration, learning speed, and psychological availability. The increased complexity is also evidenced in the nine studies that included both individual and organizational level moderators, and 12 studies with outcome variables of job satisfaction, adjustment, and performance (see Figure 1.5).

Figure 1.5 Systematic Literature Review Model - Phase 2

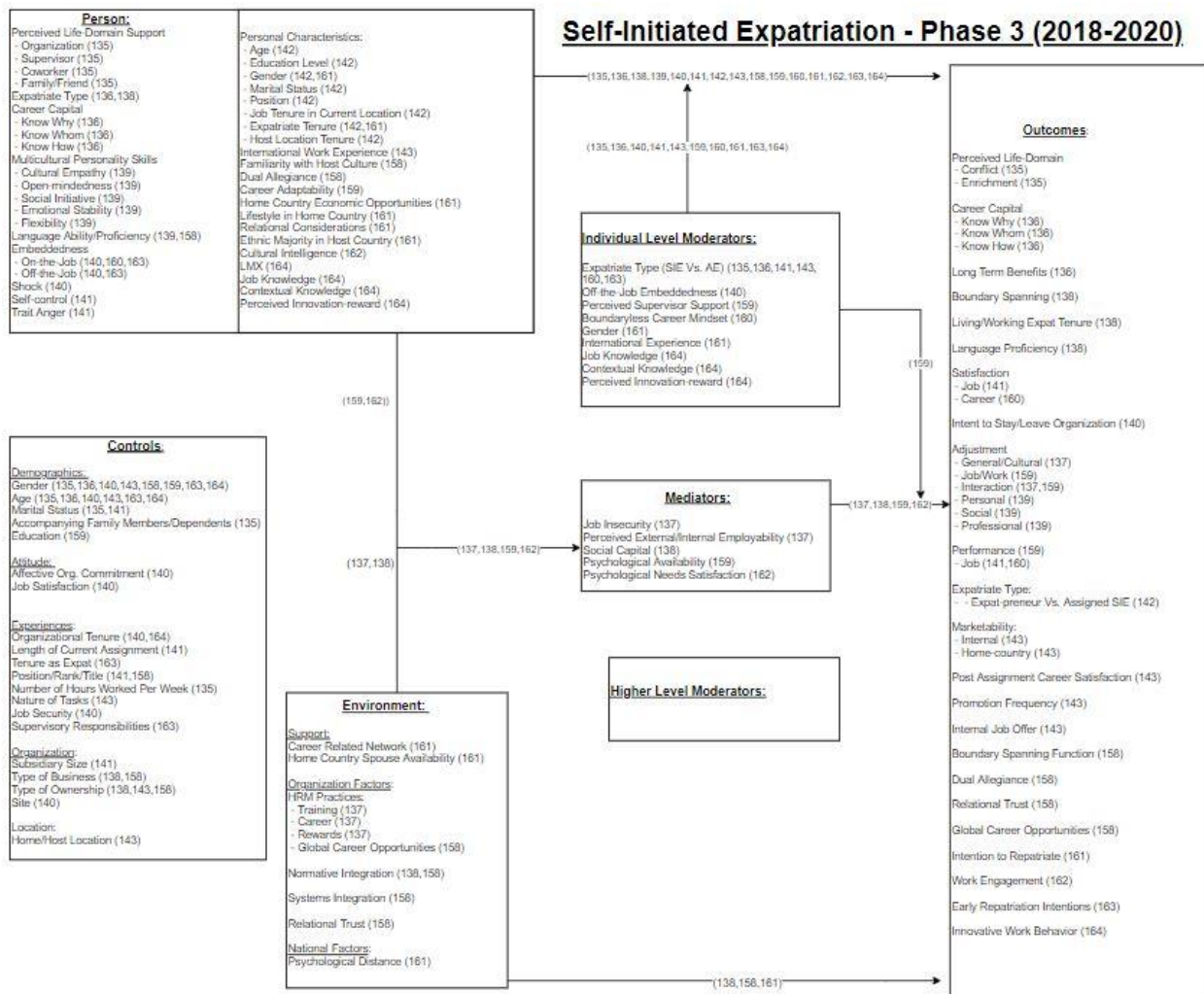


Phase 3

Phase 3 of the SIE research evolution contains studies in which individual level constructs continue to dominate the preferred level of interest for antecedents. However, SIE motivations are no longer included in the studies, as researchers have shifted their attention to the relationship between antecedents related to personal characteristics (age, education, gender, and

marital status), experiences, and skills, and outcome variables, such as career capital, boundary spanning, and engagement. Moreover, four studies included the new mediators of job insecurity, perceived employability, social capital, psychological availability, and psychological needs satisfaction; while in ten studies researchers examined individual level moderating variables (see Figure 1.6). It should be noted that the complexity of study design and subsequent analysis in Phase 3 has not changed from the studies conducted in Phase 2.

Figure 1.6 Systematic Literature Review Model - Phase 3



Review of Suggested Future Directions for SIE Research

My systematic literature review revealed that the research studies of SIEs conducted over the past 23 years have examined the relationships among plethora SIE-related antecedents, mediators, moderators, boundary conditions, and outcomes. In my systematic review of the literature, I have also analyzed the concepts that researchers have suggested for the future research directions in the SIE domain. Specifically, I have extracted, analyzed, and coded the future directions suggested in 37 influential SIE articles (see Appendix F for complete list of future directions). The chart below shows the list of concepts that I identified in the suggested future directions, as well as the frequency with which those concepts are suggested (see Table 1.8).

Table 1.8 Concepts Found in Future Directions

Concept	%
New Contexts	46%
Longitudinal	41%
New Samples	30%
Motivation - Reasons to Expatriate	24%
SIE vs AE	24%
Adjustment	22%
Career Impact of SIE	16%
(Demographics) Gather Fuller Background and Demographic	11%
Embeddedness	11%
Gender	11%
Mobility Behaviors	11%
Performance	11%
Supervisor Assessments	11%
Career Motivation	8%
Characteristics of SIE	8%
Intent to Return	8%
Intent to Turnover	8%
Job Satisfaction	8%
Repatriation	8%
Work Outcomes	8%
Acculturation	5%
Attitudes	5%

Behaviors	5%
Career Anchors	5%
Colleague Ratings	5%
Country Choice	5%
Cultural Distance	5%
Global and Local Characteristics	5%
Global career capital (SIE vs AE)	5%
Host Country Satisfaction	5%
HRM Practices	5%
Individual Level of Analysis	5%
Intent to Move Out of Host Country	5%
Intention	5%
Local hires rate SIE work adjustment	5%
Long-term outcomes	5%
Organizational Identification	5%
Perceived Organizational Support	5%
Psychological Contract	5%
Satisfaction	5%
Self-Efficacy (Cross-cultural SE)	5%
Shocks	5%
SIE vs Non expatriates	5%
Types of Expatriates	5%
Age	3%
Behavioral Intentions	3%
Bidirectional links	3%
Boundaryless Career Perspective	3%
Career Development	3%
Career Experience	3%
Career Links	3%
Career Outcomes	3%
Career Relevance	3%
Career Satisfaction	3%
Characteristics of SIEs change over time	3%
Commitment	3%
Creativity	3%
Cross-cultural Psychological Capital	3%
Cultural Training	3%
Dual country identity	3%
Education Level	3%

Employability	3%
Employee response to job relocation offer	3%
Engagement	3%
Entrepreneurship	3%
Experiential Learning	3%
Family Adjustment	3%
Family and Career Roles	3%
Family Support	3%
Field Experimental Designs	3%
Firm selection	3%
Functional Specialization	3%
Home/Host country comparisons	3%
Host Country Economic Impact of SIE	3%
Immigration Policies	3%
Impact of family	3%
Impact of HCN	3%
Individual level career Capital	3%
Intention to become SIE	3%
Intention to Stay	3%
Internationalism	3%
IPR (Intangible Particularistic Reward) and TUR (Tangible Universal Rewards)	3%
Job Autonomy	3%
Job Search	3%
Language Ability	3%
Leadership	3%
LMX	3%
Logistical Support	3%
Maintenance	3%
Managerial Intervention	3%
Managers Perceptions of SIE	3%
Marital Status	3%
Meso Level of Analysis (relationship between individual and org)	3%
Migration Stages	3%
Multi-level	3%
Opt-out Strategies	3%
Org. level Human Capital	3%
Organization Economic Impact of SIE (org resource)	3%
Organizational Cultural Diversity	3%
Organizational Culture	3%

Organizational Level of Analysis	3%
Organizational Objectives	3%
Organizational Performance	3%
Organizational Tasks	3%
Perceived Benefits of SIE	3%
Perception of SIEs	3%
Predeparture Orientation	3%
Previous Overseas Work Experience	3%
Professional Role Behaviors	3%
Protean Career Attitudes	3%
Psychological Dynamics	3%
Receptivity	3%
Recruiting	3%
Retention	3%
Return Propensity	3%
Selection	3%
SIE Capabilities	3%
SIE Population Size	3%
SIEs as strategic resource leading to competitive advantage.	3%
Social Networks	3%
Social Support	3%
Spouse Rates of adjustment	3%
Stage of Internationalization	3%
Stages of Globalization	3%
Status Transition (From SIE to AE to Migrant)	3%
Strategic Fit	3%
Structural Barriers	3%
Subjective Career Experience	3%
Subjective/Objective Career Success	3%
Supervisor Nationality	3%
Transformation	3%
Type of Employment	3%
Underemployment	3%
Use Performance Evaluation Archives	3%
Voluntary Turnover	3%
What happens to SIEs upon repatriation	3%
Willingness to SIE again	3%
Work - Life Balance	3%
Work Effectiveness	3%

Work Outcomes	3%

Future Directions

In order to synthesize the future directions found in the current SIE literature and to provide a roadmap for future research, I have categorized the proposed future research streams into six different areas focusing on methodological, intrapersonal, interpersonal, organizational, contextual, and other aspects. In the first category, the suggestion is that future SIE researchers should design studies that support sound *methodological* practices. At a basic level, the pool of participants included in SIE studies should be carefully selected, as well as thoroughly described so that comparisons can be made across studies. Explicitly reporting the demographic data of the participants, as well as describing their organizations and industries, will provide necessary information for cross-study comparisons. Additionally, multi-level studies that take into account micro, meso, and macro factors would be of significant value to the SIE literature. Particularly valuable would be the studies that incorporate field experimental and longitudinal designs and the studies that incorporate new samples and long-term outcomes.

The second broad category for proposed research in the SIE domain is related to *intrapersonal* phenomena in seven sub-domains. First, the suggestion is that future studies should focus on demographic and experiential markers that might influence SIEs differentially. Specifically, studies highlighting the experiences of SIEs with varied characteristics such as gender, race, and ethnicity, as well as variations related to their previous overseas work experience and educational levels, will provide a more complete picture of the SIE population. The second sub-domain is related to the motivations that drive SIEs to undertake international positions, particularly necessary is to examine how motivations change or stay the same over time, how the process through which motivations to engage in SIE come to fruition, and how the

opportunity to choose a country of interest and pursue a protean career influences SIE motivation.

The third sub-domain of SIE research is related to the intrapersonal phenomenon of mobility intentions and behaviors. Examination of mobility behaviors of SIEs involves examination of intent to return, intent to turnover, intent to repatriate, intent to move out of host country, intentions to stay, and willingness to engage in SIE again. Understanding the mobility of SIE and their various intentions is of great importance to both researchers and managers of multinational organizations. The fourth sub-domain is related to the psychological impact of the SIE's career. Particularly relevant are the factors related to SIE career satisfaction, commitment, and success as well as the factors related to their career anchors, boundaryless career perspective, development, experience, and outcomes.

The fifth sub-domain is related to the psychological comfort and affect that SIEs feel and exhibit towards their job, organization, community, and host culture. Specifically, psychological issues related to adjustment, acculturation, engagement, attitudes, and satisfaction should be further explored. The sixth sub-domain addresses how the perceptions of the multinational organization influences SIEs. In particular, future studies should examine how the concepts of organizational identification, perceived organizational support, the psychological contract, and perceived work/life balance influence SIEs cognitions and emotions.

The seventh sub-domain is related to perceived performance, self-efficacy, commitment, creativity, cross-cultural psychological capital, dual country identity, experiential learning, psychological dynamics, receptivity, subjective career experience, subjective career success, embeddedness, and psychological effects of perceived underemployment.

The third broad category of future SIE studies addresses *interpersonal* issues that impact SIEs and the individuals with whom they interact, such as AEs, migrants, and host country nationals. Particularly relevant is further examination of the impact that immediate and extended family have on SIEs adjustment and support. Furthermore, the SIEs' relationships inside and outside their work and expatriate communities could be fruitful grounds for research.

The fourth broad category for future SIE studies involves inquiry into the multinational *organizations* that employ this group of individuals. There are four sub-domains related to the impact of the organization on SIEs. The first sub-domain is related to human resource practices, such as cultural training, recruiting, retention, selection, and both voluntary and involuntary turnover. The second sub-domain is related to organizational perceptions of SIEs in terms of their employability, managerial reception of SIEs, contribution of SIEs to organizational level human capital, economic impact of SIEs, the view of SIEs as strategic resources, and the strategic fit of SIEs.

The third sub-domain of future research related to SIEs in multinational organizations is related to organizational characteristics and desired outcomes of organizations that employ SIEs. Specifically, future studies should consider individual, team, unit, and organizational outcomes related to the employment of SIEs, as well as organizational characteristics such as cultural diversity, entrepreneurial initiatives, and performance goals. The fourth sub-domain is related to the relationship between the organization and the SIE. For example, future studies should examine the impact of organizational support for SIEs through logistical and financial aid and the impact of leadership through leader-member-exchange or managerial intervention on SIEs' physical, emotional, and psychological health.

The fifth broad category of future SIE studies is related to *contextual* variables. For example, contextual variables that arise from national context include cultural distance between home and host countries, immigration policies, host country perceptions of SIEs, national stage of globalization, and structural barriers. Also, global shocks, such as a pandemic or economic disruption, can impact SIEs and their organizations, as well as the acceptance of different forms and means of international virtual work made possible through technological developments. Therefore, the suggestion is that SIE researchers should conduct future studies in new contexts and under varying conditions in order to better understand the impact of contextual influences on SIEs and their employing organizations.

The sixth and the final category of future SIE studies is related to a variety of *other* suggestions that have been brought up in the SIE literature. For example, SIE researchers should design future studies to examine SIE job search, SIE responses to job relocation offers, as well as the opt-out strategies and predeparture orientation that may shed light on their turnover patterns. In addition, understanding SIEs' social networks, social support, and how they might transition from AE to SIE to migrant (or some other combination) would also provide novel insights. Finally, the review of SIE experiences upon repatriation and re-expatriation has garnered little attention in the literature. In sum, I have outlined multiple promising avenues for future research in the SIE domain that fall under the categories of methodology, intrapersonal, interpersonal, organizational, contextual, and other (See table 1.9). However, I recognize that this field of inquiry has just begun its third decade, and therefore the phenomenon of SIE is likely to continue to grow for the foreseeable future.

Table 1.9 Future Directions in SIE Research

Future Directions in SIE		
Category	Sub-Category	Issues

Methodology	<u>Design</u>	Longitudinal, multi-level, field experiments
	<u>Description</u>	Rich demographic description, organizational information, new samples, long-term outcomes
	<u>Paradigm</u>	Positivism, constructivism
Intrapersonal	<u>Idiosyncrasies</u>	Gender, race, previous international work experience, education
	<u>Motivations</u>	Changes in motivation over time, motivation to action process, ability to choose country
	<u>Intentions</u>	Intentions to return, turnover, repatriate, move from host country, stay, engage in further expatriate activities
	<u>Career</u>	Satisfaction, commitment, relevance, anchors, boundaryless career perspective, development, experiences, and outcomes.
	<u>Comfort/Affect</u>	Attitude towards job, organization, community, host culture, adjustment, acculturation, engagement, and satisfaction.
	<u>Org. Influence</u>	Perceived organizational support, identification, psychological contract, work-life balance.
	<u>Other</u>	Perceived performance, self-efficacy, commitment, creativity, cross-cultural psychological capital, dual country identity, experiential learning, psychological dynamics, embeddedness, perceived underemployment.
Interpersonal	<u>Work Relationships</u>	Supervisors, leaders, host country national co-workers, as well as comparison of AE, SIE, and migrants.
	<u>Family Relationships</u>	Family in home country and host country and how those relationships impact perceived support, adjustment, and achievement of career goals.
Organizational	<u>HRM Practices</u>	Cultural training, recruiting, retention, selection, and voluntary and involuntary turnover.

	<u>Perceptions of SIEs</u>	SIE employability, managers perceptions of SIEs, organizational level human capital, economic impact, strategic resources, competitive advantage, and strategic fit.
	<u>Org. Characteristics</u>	Cultural diversity, entrepreneurial initiatives, organizational nationality, and number and type of subsidiary units.
	<u>Org./SIE Relationship</u>	Impact of organizational support through logistical and financial aid, leadership, LMX, and managerial intervention.
Contextual	<u>National</u>	Cultural distance between home and host country, immigration policies, host country perceptions of SIEs, national stage of globalization, and structural/cultural barriers.
	<u>Global</u>	Health pandemic, economic disruption, natural disaster, and regional instability.
	<u>Technological</u>	Incorporating and accepting different forms and means of international work made possible through technological development.
Other	<u>Turnover Patterns</u>	Job search, response to job relocation offers, opt-out strategies, predeparture orientation.
	<u>Category Changes</u>	Social networks, social support, and how SIEs transition between AEs, SIEs, and migrants.
	<u>Repatriation</u>	Implications and outcomes of SIE experiences upon repatriation and re-expatriation.

Summary of Essay One

In Essay One, I have provided a broad overview of research in the SIE domain not only by reviewing the previous SIE reviews, and highlighting their contributions, but also by providing my following unique contribution to the SIE literature. First, I developed a new typology of globally mobile workers with theoretically grounded dimensions. Second, I reviewed

the historical terms and definitions used in the published SIE studies, analyzed the extant SIE definitions, and derived in a rigorous manner a new unifying SIE definition. Third, I provided a synthesized model of the quantitative literature that represents the nomological network of the SIE construct. Fourth, I reviewed, coded, and analyzed the future research directions that have been suggested in the reviewed studies to outline a roadmap for future research studies in the SIE research domain.

Using Essay One to Guide Essay Two and Essay Three

Based on my findings derived from the reviewed future directions that have been suggested in previous SIE studies, I have designed the studies described in Essay Two and in Essay Three of this dissertation to test empirically these issues of interest. Specifically in Essay Two, I examine the mediating impact of organizational embeddedness on the relationship between servant leadership and turnover intentions. In Essay Three, I use the sequential explanatory mixed-method design to examine the relationships between SIE embeddedness, adjustment, and turnover in a multinational organization. In these two Essays, I focus on the concepts and relationships that have been suggested in the future directions of Essay One by including new contexts, longitudinal analysis, new samples, and relationships between leadership, adjustment, demographics, embeddedness, and intent to turnover.

ESSAY TWO: SERVANT LEADERSHIP AND TURNOVER INTENTIONS OF SELF-INITIATED EXPATRIATES: A MODERATED MEDIATION STUDY OF ORGANIZATIONAL EMBEDDEDNESS AND ORGANIZATIONAL IDENTIFICATION

ESSAY TWO ABSTRACT

In this Essay Two, I introduce the concept of servant leadership into the domain of self-initiated expatriation. Drawing on the conservation of resource (COR) theory and the research on organizational identification, I theorize and empirically examine the influence of servant leadership on the turnover intentions of self-initiated expatriates (SIEs). I surveyed 168 SIEs working in a single multinational organization and found that servant leadership negatively affects SIEs' turnover intentions by increasing their organizational embeddedness; however, this relationship is moderated by the SIE's level of organizational identification.

Key Words: Servant leadership, organizational embeddedness, organizational identification, self-initiated expatriate, turnover intentions, conservation of resource theory

Introduction:

Multinational organizations are increasingly utilizing self-initiated expatriate (SIE) employees in their foreign subsidiary units because of the SIEs' lower employment compensation cost and higher levels of intrinsic motivation to relocate and work internationally as compared to their assigned expatriate counterparts (Tharenou, 2015; Doherty, 2013). However, the lower compensation cost benefit that multinational organizations realize can be mitigated by a related latent turnover cost due to the higher turnover rate of SIEs (Biemann & Andresen, 2010). To address costly SIE turnover, the turnover intentions of SIEs have been examined in multiple studies conducted across multinational organizations with the aim to identify the factors that influence SIE turnover (Ren, Shaffer, Harrison, Fu, & Fodchuk, 2014; Tharneou & Caulfield, 2010; Tharenou, 2015). After conducting the systematic literature review described in Essay One, along with reviewing the future directions of past SIE studies, I identified a gap in the SIE domain related to the impact of leadership on SIE turnover intentions. Biemann and Andresen (2010) specifically call for future SIE researchers to examine "leadership issues of SIEs in order to find out whether special management methods are needed for SIEs" (p. 444).

One management method that has been adopted in multinational organizations, such as Intel, Marriott, Starbucks, and Southwest Airlines, has been to enact servant leadership practices that are aimed at empowering followers to grow in multiple dimensions such as ethical, emotional, relational, and spiritual (Eva, Robin, Sendjaya, van Dierendonck, & Liden, 2019). Moreover, researchers have examined how servant leadership impacts employee turnover intentions in domestic settings (Hunter, Neubert, Perry, Witt, Penney, & Weinberger, 2013; Zhao, Liu, & Gao, 2016; Jaramillo, Grisaffe, Chonko, & Roberts, 2009; Babakus, Yavas, &

Ashill, 2010; Yavas, Jha, & Babakus, 2015; Kashyap & Rangnekar, 2016; Eva, Robin, Sendjaya, van Dierendonck, & Liden, 2019), however, this impact has not yet been examined in the context of SIEs.

Servant leadership is characterized by leaders putting the needs of their followers above their own needs (Liden, Wayne, Meuser, Hu, Wu, & Liao, 2015), and therefore is likely to matter in the SIE domain because previous studies have indicated that SIEs need guidance and support to acquire the resources that help them to navigate their new environment (Ramalu & Subramaniam, 2019; Ballesteros, Poilpot-Rocaboy, & St-Onge, 2018). Due to the emphasis on SIE resource acquisition among SIEs and following the recommendation for future research of servant leadership by Eva et al. (2019) and Ballesteros-Leiva, Poilpot-Rocaboy, and St-Onge (2017), I use the conservation of resources (COR) theory (Hobfoll & Wells, 1998) and build on the work of previous SIE researchers to examine whether servant leadership, may contribute to reduction of SIE's turnover intentions. Specifically, I test empirically for the potential mediating mechanism of organizational embeddedness, which is grounded in COR theory, and for the moderating influence of organizational identification, which is grounded in social identity theory (Ashforth & Mael, 1989).

My study described in this Essay Two provides several contributions. First, this study answers the call by Chen and Shaffer (2017) to “further explore the possible factors that contribute to SIE embeddedness” (p. 206) and the call by Lo, Wong, Yam, and Whitfield (2012) to study SIE turnover intentions among SIEs as this study is the first in the SIE domain to utilize the conservation of resource theory as the foundation to model SIE turnover intentions by examining how servant leadership impacts the SIE followers' turnover intentions through the mechanism of organizational embeddedness.

Second, this study answers the call by Huning et al. (2020) for “increased research efforts that may shed light on potential moderators in the established relationship” (p. 12). Testing the influence of potential moderation reveals the conditions under which a particular relationship can be examined. Specifically, as organizational identification has been shown to moderate the relationship between embeddedness and other factors in the expatriate literature (Yunlu, Ren, Fodchuk, & Shaffer (2018), in this study, I test whether organizational identification is a potential moderator of the relationship between servant leadership and embeddedness among SIEs. Third, this study contributes uniquely to the domain of SIE sampling by addressing the issue that, “mixed samples in SIE research contain disproportionately large clusters of certain professions” (Andresen, Pattie, and Hippler, 2020, p.192). In particular, there is a need for more purposeful sampling because mixed pools of samples have the potential to “unduly influence the results” (Andresen, Pattie, & Hippler, 2020, p.192). Put differently, my test is uniquely valuable for the SIE research domain because I followed the calls by Andresen, Pattie, and Hippler (2020) and Tang, Chang, and Chen (2017) to utilize purposeful sampling of a single SIE professional type (i.e., non-academic educational professionals) who live and work in multiple countries but are employed by the same multinational organization.

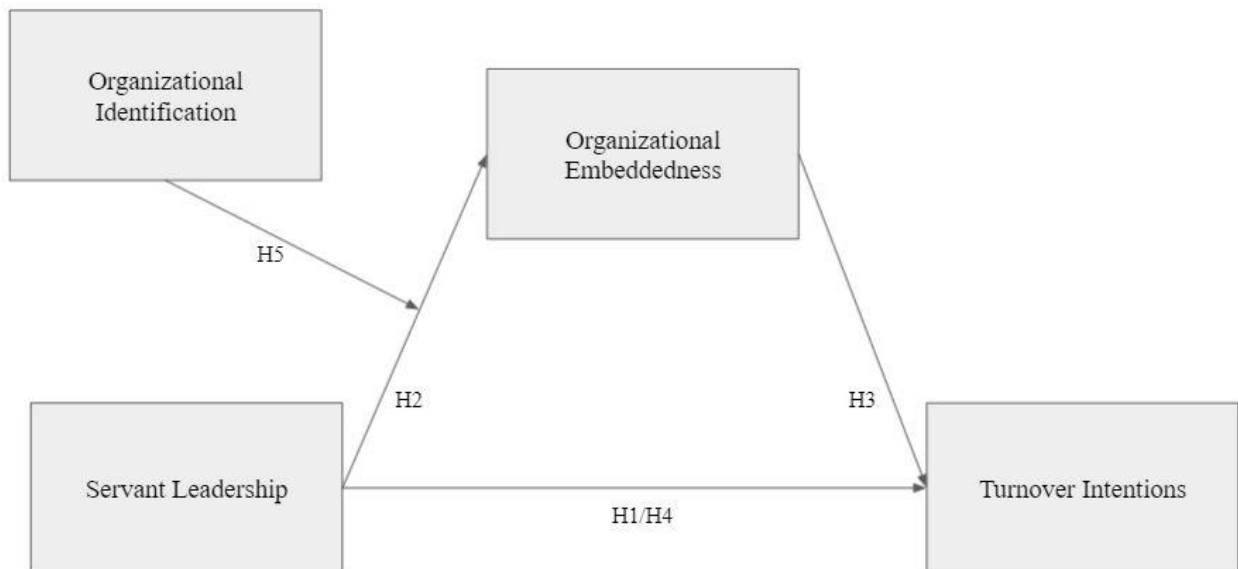
The final contribution of this study is that it answers Andresen et al.’s (2020) call for more studies that take into account the context in which SIEs operate. A study by Selmer, Luring, Norman, & Kubovcikova (2015) examined the role of context by comparing SIEs who work for locally owned vs. foreign-owned organizations, while another study examined language difficulty as a contextual factor (Selmer & Luring, 2015). Encouraging the pursuit of this kind of research, Andresen et al (2020) stated, “Some interesting work on the role of context factors has begun ... We strongly encourage further work of this nature” (p.192). I respond to this

encouragement by sampling SIEs only from a single multinational organization. In summary, the main contributions of my study described in this Essay Two include: 1) introduction of the conservation of resource theory into the SIE domain; 2) introduction of servant leadership as a factor influencing turnover intentions; and 3) examination of contextual factors within SIE studies by focusing this study to one occupational type and in one multinational organization.

Theoretical Background and Hypotheses

My proposed model is shown in Figure 2.1. I first define the main driver of this model – servant leadership. Also, as this model is grounded in the conservation of resources (COR) theory, I provide a brief overview of COR theory (Hobfoll & Wells, 1998) before I describe how it can be used in combination with social identity theory to explain the impact of servant leadership on SIEs’ organizational embeddedness and turnover intentions, and to develop the related hypotheses.

Figure 2.1 Hypothesized Moderated Mediation Model



Note: All hypothesized relationships are negative except for H2 and H4, which are positive. H4 represents an indirect effect. H5 represents the first-stage moderated mediation effect. H = hypothesis.

This model (Figure 2.1) was developed as an outcome of the systematic review and subsequent nomological network presented in Essay One of this dissertation. Specifically, once I compared the calls for future research found in the extant SIE literature to the SIE nomological network, which represents the current state of the domain, I discovered concrete gaps in the SIE domain that have been neglected in extant research studies. More specifically, I found that there were only twelve studies that examined the turnover of SIEs and that seven of those studies did not test theories as their models did not contain the use of mediating variables. The remaining five studies were theory-based and grounded in expectancy theory (Tharenou & Caulfield, 2010), job-demands-resource theory (Ren, Shaffer, Harrison, Fu, & Fodchuk, 2014), unfolding theory of turnover (Lo, Wong, Yam, & Whitfield, 2012), social exchange theory (Cao, Hirschi, & Deller, 2014), and met expectations theory (Ababneh, 2020). Three of these studies identified embeddedness as an important antecedent to SIE turnover (Lo et. al., 2012; Tharenou & Caulfield, 2010; Ren et. al., 2014). However, none of these twelve studies examined the influence of any type of leadership on turnover intentions of SIEs.

Addressing this void in the SIE research is important because the influence of leadership on turnover in organizations has garnered the attention of many researchers and practitioners. More specifically, previous studies have found a significant relationship between servant leadership and turnover intentions in domestic settings (Hunter, Neubert, Perry, Witt, Penney, & Weinberger, 2013; Zhao, Liu, & Gao, 2016; Jaramillo, Grisaffe, Chonko, & Roberts, 2009; Babakus, Yavas, & Ashill, 2010; Yavas, Jha, & Babakus, 2015; Kashyap & Rangnekar, 2016; Eva, Robin, Sendjaya, van Dierendonck, & Liden, 2019). To address this void, I designed this study to test the COR theory-based relationship between servant leadership and turnover intentions via organizational embeddedness in the context of SIEs and examined the social

identity theory-based boundary condition of organizational identification, which has been found to impact turnover intentions in previous research (Kawai & Mohr, 2020).

Definition of Servant Leadership and Overview of COR Theory

Definition of Servant Leadership

The construct of servant leadership was originally proposed by Robert Greenleaf (1970) who argued that leaders are particularly effective when they serve those that follow them. Servant leadership is defined as an “(1) other-oriented approach to leadership (2) which is manifested through one-on-one prioritizing of follower individual needs and interests, (3) and outward reorienting of their concern for self towards concern for others within the organization and the larger community” (Eva et al., 2019, p.114). This definition implies that servant leadership reflects a leader’s mindset, motive, and mode that are focused primarily on enhancing the good of followers and others. While both the definition and dimensionality of servant leadership is still being refined, one of the more robust and commonly used conceptualizations of servant leadership among researchers posits seven independent dimensions including: emotional healing, creating value for the community, conceptual skills, empowering, helping subordinates grow and succeed, putting subordinates first, and behaving ethically (Van Dierendonck, 2011; Eva et al., 2019; Liden et al., 2015). The theoretical conceptualization of servant leadership that utilizes the seven dimensions above has been operationalized and validated using the SL-7 instrument (Wang, Guan, Cui, Cai, & Liu, 2021; Iqbal, Latif, & Ahmad, 2020; Liden et al., 2015).

Furthermore, researchers have studied the impact of servant leadership on follower behavioral outcomes such as organizational citizenship behaviors (Amah, 2018; Wu, Tse, Fu, Kwan, & Liu, 2013), helping behaviors (Zao, Tian, & Liu, 2015; Neubert et al., 2008), and voice

behaviors (Duan, Kwan, & Ling, 2014; Lapointe & Vandenberghe, 2018); as well as follower attitudinal outcomes such as employee engagement (Coetzer, Bussin, & Geldenhuys, 2017; de Sousa & van Dierendonck, 2014), job satisfaction (Schneider & George, 2011; Chan & Mak, 2014), and turnover intentions (Kashyap & Rangnekar, 2016; Yavas, Jha, & Babakus, 2015). For a comprehensive systematic review of the extant research surrounding servant leadership see Eva et al. (2019) or Langhof & Guldenberg (2020).

Overview of COR Theory

The conservation of resource (COR) theory is a needs-based motivational theory that has been used to explain why individuals acquire and conserve resources of relevance for their goals. COR theory is most commonly used to model how individuals cope with and relate to stress (Hobfoll & Wells, 1998). Initially, the term “stress” was imported from physics to psychology to describe the human physiological responses observed when individuals react to external stimuli (Cannon, 1932; Selye, 1950; Caplan, 1964; Lindemann, 1944), particularly the stimuli that cause individuals to become emotionally upset (Elliot & Eisdorfer, 1982). The main assumption of this view of stress is that both stimuli and an individual’s reaction to that stimuli are important considerations (Spielberger, 1966, 1972).

Subsequent stress studies used the homeostatic model of stress (McGrath, 1970; Lazarus, 1966), which is based on the definition of stress as, “a particular relationship between the person and the environment that is appraised by the person as taxing or exceeding his or her resources and endangering his or her well-being.” (Lazarus & Folkman, 1984, 19). Specific to this definition is an individual’s perceived, not actual, mismatch between his or her capacity to respond and the objective demand for response. However, this model and the stimulus model were abandoned once Hobfoll and Wells (1989) identified tautological and untestable issues

associated with them, and they subsequently proposed a conceptualization of stress based on the conservation of resources model.

Hobfoll and Wells (1989) define psychological stress as, “a reaction to the environment in which there is (a) the threat of a net loss of resources, (b) the net loss of resources, or (c) a lack of resource gain following the investment of resource” (p. 516). Based on this definition, stress occurs when resources are either perceived as lost or are objectively lost, or there is a threat of resource loss, or lack of resource gain following a resource loss. Therefore, it is crucial to understand what resources are in order to understand psychological stress. Hobfoll and Wells (1989) define resources as, “those objects, personal characteristics, conditions, or energies that are valued by the individual or that serve as a means for attainment of these objects, personal characteristics, conditions, or energies” (p. 516). Hobfoll and Wells’ (1989) conceptualization of stress is based on the premise that individuals are motivated to protect, retain, and build resources, and that individuals are threatened by perceived or actual loss of resources. This resource-oriented model of stress, with its “directly testable, comprehensive, and parsimonious” composition (Hobfoll & Wells, 1989), is the foundation of the COR theory.

COR theory posits that individuals desire to develop, acquire, retain, and secure resources that they value (Hobfoll, Halbesleben, Neveu, & Westman, 2018). Due to this desire, they attempt not only to protect their acquired resources against potential resource loss, but also to gain additional resources when it is possible. In these attempts, protecting a resource that has already been acquired is subjectively more valuable to them than gaining a comparable resource that they individually do not yet possess. Also, when resources have been lost, resource gains become particularly important. However, when resources have been spread thin or depleted, individuals tend to exhibit defensive behaviors focusing on preserving their remaining limited

resources. These defensive behaviors are particularly observable in the settings that limit the potential for resource gains and maintenance, as well as in settings where individuals possess few resources (Hobfoll, Halbesleben, Neveu, & Westman, 2018). (I have addressed several common criticisms of COR theory in Appendix G.)

Using COR Theory to Explain the Relationship between Servant Leadership and SIE Turnover Intentions

I argue that the application of the conservation of resource theory to explain the turnover intentions of SIEs because SIEs encounter a significant objective loss of resources upon their international relocation. Unlike assigned expatriates, SIEs do not work for their multinational organizations before their international relocation, therefore they experience significant social and knowledge resource losses associated with leaving their former employer. For example, SIEs lose the working relationship they have with their immediate supervisor when they assume a new international position. Additionally, SIEs lose the tacit knowledge regarding the policies, procedures and practices that they accumulated through their work experience with their former employer. Therefore, according to COR theory, the sudden loss of a host of personal resources that they possessed in their native country environment leaves SIEs with a strong desire to protect and retain their valuable remaining resources, while striving to acquire new resources. However, their ability to gain new resources is limited due to their loss of preexisting, particularly social, resources (i.e., relationship with manager/supervisor). This resource void motivates SIEs to search for external sources (e.g., servant leaders) that might help them to acquire resources that are crucial to navigating the new environment and achieving their desired goals. Previous research studies have found that servant leaders influence followers attitudinal, performance, and behavioral outcomes (Eva et. al., 2019).

Specifically, researchers studying servant leadership have found that the leaders who exhibit the servant leadership style may lower their follower's turnover intentions. For example, Hunter, Neubert, Perry, Witt, Penney, and Weinberger (2013) used social learning theory and social exchange theory and found a significant negative relationship between servant leadership and turnover intentions. This negative relationship was also found by Jaramillo, Grisaffe, Chonko, and Roberts (2009) who used virtue ethics theory; Huning, Hurt, and Frieder (2020) who used servant leadership theory; Zhao, Liu, and Gao (2016) who used social identity theory; Babakus, Yavas, and Ashill's (2010) who used person-job fit and burnout; Yavas, Jha, and Babakus (2015) who used self-determination theory. Additionally, Kashyap and Rangnekar (2016) used social exchange and social identity theories to develop a sequential mediation model depicting how employer brand perception and trust in leaders mediate the relationship between servant leadership and turnover intentions.

I build on the above studies, which share a common finding that servant leadership has a significant negative impact on individual turnover intentions (Hunter et al., 2013; Jaramillo et al., 2009; Huning et al., 2020). I also respond to Huning, Hurt, and Frieder's (2020) call for, "future research that will further attempt to disentangle the relationship between servant leadership and important work outcomes such as employee turnover" (p. 189). Based on the premise that servant leaders are, "better suited for supporting and retaining followers" (Huning et al., 2020: 189), I argue that servant leaders can provide support and resources that are instrumental for SIEs as they navigate their new roles and environment. In addition to nurturing knowledge sharing (Taun, 2016), previous studies have found that servant leaders provide for psychological needs related to autonomy, competence, and relatedness (Chiniara & Bentein, 2016; van Dierendonck, Stam, Boersma, Windt, & Alkema, 2014). Specific valuable resources that SIEs

gain from servant leaders may include anything that SIEs perceive to help them achieve their goals in the new environment and stay employed in the organization (Halbesleben et al., 2014).

H1: Servant leadership is negatively related to SIEs turnover intentions.

The Relationship between Servant Leadership and Organizational Embeddedness

Organizational embeddedness is a psychological construct reflecting the degree to which individuals feel connected to their organization (William Lee, Burch & Mitchell, 2014). In broad terms, embeddedness refers to the combination of forces that work together to keep individuals from leaving their job, organization, or community (Yao, Lee, Mitchell, Burton, & Sablinski, 2004). This construct has three dimensions: fit, links, and sacrifice. Taken together, these three dimensions represent the extent of “stuckness” to the employing organization that individuals experience. Other than organizational embeddedness, additional forms of embeddedness include occupational embeddedness, community embeddedness, and job embeddedness (Jolly & Self, 2020).

Conservation of resources theory posits that those individuals who lose valuable resources will take action to gain or create new resources. Therefore, according to COR, SIEs who relocate to a new country lose many of their valued resources and will desire to acquire or develop new valuable resources. The leader is a particularly important and powerful resource that can be instrumental in helping to regain various object, personal, conditional, and energy resources within the SIEs’ new work organization. The SIE’s new leader will likely possess or have access to key resources that, if shared or given to the SIE, will allow the SIE to achieve their goals.

When the SIE’s needs are met by their servant leader, the SIE will feel more embedded within the organization. For example, when a leader exhibits the servant leadership style and

interacts with a new SIE in the organization, the interaction will likely result in specific knowledge acquisition by the SIE (Tuan, 2016). In effect, servant leaders engender collaboration through knowledge sharing which results in affective commitment and fit (Pee & Min, 2017). Additionally, owing to the introductions by the servant leaders, an SIE may gain access to various department heads and experienced individuals within those departments who can help the SIE navigate the new socio-cultural environment. As a result of the knowledge and relational resource acquisitions, the SIE will experience an increased level of organizational embeddedness through the link, fit, and sacrifice dimensions. Therefore, I hypothesize:

H2: Servant leadership is positively related to SIEs organizational embeddedness.

The Relationship Between Organizational Embeddedness and Turnover Intentions

When SIEs experience increased levels of organizational embeddedness, they feel “pulled” to remain in their organization, and thus are less likely to turn over (Tharenou & Caulfield, 2010). This pull to remain is influenced by three factors. The first factor reflects the institutional, individual, and group links that the SIEs have established while working in the multinational organization. The second factor reflects the fit that they experience between their individual goals, values, and plans, and those of the organization. The third factor that pulls SIEs to remain within the multinational organizations reflects the potential sacrifices that SIEs would give up if they were to leave their multinational organization (Mitchell, Holtom, & Lee, 2001; Lee & Mitchell, 1994). In other words, SIEs who are embedded within their organization would have to make greater sacrifices if they were to leave their organization than SIEs that were not embedded within their organizations.

H3: Organizational embeddedness is negatively related to SIEs turnover intentions.

The Mediating Effect of Organizational Embeddedness

Servant leaders, by definition, prioritize the needs of their followers. Therefore, when servant leaders meet SIE needs in terms of fit, links, and sacrifice, the followers will likely become more organizationally embedded. The increase in organizational embeddedness will further reduce turnover intentions.

H4: Organizational embeddedness will mediate the relationship between servant leadership and turnover intentions.

The Moderating Effect of Organizational Identification

I apply social identity theory (SIT) to explain the influence a SIE's social identity has on the relationship between servant leadership and their organizational embeddedness, as well as the SIE's subsequent intent to turn over. Social identity theory, which has been applied in several business disciplines including international management, organizational communication, marketing, organizational behavior, human resource management, strategy, and organizational studies (Haslam & Ellemers, 2005; Cornelissen et al., 2007; Ashforth & Mael, 1989), has identification as its key concept (Pratt, Schultz, Ashforth, & Ravasi, 2016). This theory posits that people understand who they are, not only individually based on their idiosyncrasies, but also socially as part of groups (Tajfel, 1969) because groups typically provide individuals with a sense of belongingness, pride, safety, and self-esteem. When social groups are categorized based on appearances, backgrounds, affiliations or any number of different markers, individuals tend to elevate the importance of the groups to which they belong while discounting groups to which they do not belong. This process of categorization results in the psychological formation of an individual's perception of in-group and out-group membership, which engenders their distancing thoughts between "them" and "us." Due to this categorization, in-group bias may develop over

time whereby individuals share positive attitudes towards the members of their in-group with whom they identify and negative attitudes toward the members of out-groups with whom they do not identify (Hogg & Turner, 1985). This bias is particularly salient when individuals make group comparisons (Tajfel & Turner 1986) because social identity is made salient when individuals systematically categorize and define themselves and others in order to make sense of their socio-cultural environment (Ashforth & Mael, 1989). In organizational settings where individuals take the role of employees, they exhibit over time a propensity to identify with the organization, thus forming organizational identification on which they rely when dealing with role conflict, intergroup relations, organizational socialization, and work transitions when they experience a loss of work-related belonging (Conroy & O’Learly-Kelly, 2014).

Organizational identification may influence the relationship between the servant leadership and SIE embeddedness. Specifically, the weaker an SIEs’ identification is with the organization, the stronger will be the need for the influence of servant leadership, which will increase their organizational embeddedness and mitigate their turnover intentions. This moderated mediation effect occurs because SIEs with higher levels of organizational identification already possess the central resource of meaning and purpose derived from their belonging to the organization, and therefore do not need as many resources to be provided by their servant leaders to become more embedded in the organization.

SIEs with low levels of organizational identification do not have a strong psychological connection to the organization, therefore their organizational identification might not be greatly influenced by various members and structures of the organization outside of their leader due to their physical and/or operational distance. However, they are likely to attract the attention of a servant leader whose support and concern has the potential to impact how SIEs view their new

socio-cultural environment. In contrast, SIEs with high organizational identification will likely rely less on their servant leader's attention in order to psychologically embed themselves within the organization as they can identify with the organization through other avenues, rather than solely rely on their leader. Therefore, SIEs with lower organizational identification will more heavily rely on their servant leaders for social cues and resources as they develop their organizational embeddedness. In particular, they are likely to accept the knowledge shared and introductions provided by their servant leader, which will lead to increased fit, links, and sacrifice (i.e., organizational embeddedness) as compared to the SIEs that exhibit higher levels of organizational identification.

The extent to which individual SIEs feel identified with their multinational organizations will influence their reliance on their servant leader for resource acquisitions, which will subsequently impact their organizational embeddedness. In other words, if an SIE has a strong sense of organizational identification, they can be influenced by a wide range of social influences and no single influence (i.e. their leader) will have an overwhelming influence. Alternatively, if an SIE, who has lost a host of social and relational connections due to their relocation, does not share a strong sense of organizational identification they may be more susceptible to the influence of their servant leader due to their position in the organization and their willingness to meet the follower's needs.

H5: Organizational identification will moderate the mediation effects of organizational embeddedness on the relationship between servant leadership and turnover intentions whereby SIEs with lower organizational identification will experience stronger mediation effects through organizational embeddedness than SIEs with higher organizational identification.

Methodology

Description of Sample and Survey

The sample of participants comes from employees of one US-headquartered multinational educational organization. These employees work as self-initiated expatriates in American-style, English speaking schools located in 13 countries around the globe. As all of the SIEs participating in the study are proficient in English (this is a requirement in order to be employed by all of the schools), the survey was administered only in English. The schools employing the SIEs are located in the following countries: South Korea (3), Malaysia (1), East Asia (1), Singapore (1), Japan (1), Indonesia (1), Turkey (1), Kenya (1), Peru (1), Bolivia (1), Brazil (1), and Kosovo (1).

This sample is valid for both practical and theoretical reasons. At the practical level, the individuals that participated in the study are SIEs working internationally for a single multinational organization. Therefore, the nature of the participants in the sample contributes uniquely to the SIE literature. At the theoretical level, this purposive sample is valid for the examination of COR theory because SIEs experience a significant loss of resources, making this group a prime population for testing the theory that makes predictions about behaviors that result from the loss of resources. Additionally, the sample is valid due to the values held by the organizational leaders and the nature of the followers that join the organization.

In the examined multinational organization, the leaders are encouraged to exhibit the servant leadership style. While servant leadership training has been administered to some leaders in the organization, not all leaders have received this training. Therefore, there is expected to be variation in the amount of both actual and perceived servant leadership demonstrated to the SIEs at different units of the organization. Furthermore, because roughly 25% of the organization's

SIE staff turn over each year, there was a variation in the extent that individuals participating in this study felt identified, embedded, and cross-culturally adjusted within the organization and their international communities. While the emphasis on and training of servant leadership among the leaders in the organization might reduce the amount of variance detected, any significant relationships that are found make a stronger case for the importance of servant leadership. In sum, this sample is valid because potential participants meet the criteria to be considered SIEs and they will likely vary in their perceptions of the salient constructs of interest for this study.

I received a total of 168 valid responses, which represents an overall response rate of 28%. According to Tharenou (2015) more than half of the published SIE articles do not report response rates; Harrison and Shaffer (2005) reported a 14% response rate in their study and also revealed that the median response rate for expatriate studies is 22%; Linder (2019) reported a response rate of 24%. My sample size and participant response rate are satisfactory when compared to the previous studies surveying SIEs (Linder, 2019; Ramalu & Subramaniam, 2019; Furusawa & Brewster, 2019; Halim, Bakar, & Mohamad, 2018; Tang, Chang, & Cheng, 2017; Chen & Shaffer, 2017). Table 2.1 describing the sample shows that the majority of SIEs in the sample are between the ages of 20 and 49, have been with the organization between 1 and 10 years, have earned a bachelor or master's degree, are married, have at least a moderate level of international experience, are female, and come from the United States of America.

Table 2.1 Socio-demographic profile of respondents

Demographic Variable	% of Total Sample
Age Mean (39.17)	
20-29	25.2
30-39	29.8
40-49	26.5
50-59	13.2
60 or more	5.3
Organizational Tenure	
< 1 Year	4.8
1 Year	24.8
2 Years	16.8
3-5 Years	20.8
6-10 Years	20
11-15 Years	8.8
> 15 Years	4
Educational Attainment	
High school diploma or below	1.3
Bachelor's degree	46.5
Master's degree	43.2
Specialist in education	4.5
Doctorate/Professional degree	4.5
Marital Status	
Married	57.8
Single	42.2
Level of International Experience	
Not experienced at all	7.8
Slightly experienced	14.3
Moderately experienced	24.7
Very experienced	29.2
Extremely experienced	24
Sex	
Female	75.8
Male	24.2
Nationality	
USA	86.5
Canada	3.9
Other	9.6

The survey was administered through Qualtrics and open to the participants to fill it in from the start of the winter school break in 2019 through the time the staff returned to work after the break in 2020. As the multinational organization providing access to the participants conducts multiple staff surveys (they administered nine in 2020) throughout the year, the organization's management was concerned about staff survey fatigue. Therefore, it limited the data collection for this study to a single wave. Once the survey was approved, the survey instructions and items were entered into an instrument in the Qualtrics platform. Per the participating organization's instructions, the survey link was embedded within a prepared email that was sent to the vice president of leadership development (VPLD) for the organization. The VPLD sent the email to the directors of the schools located at the organization's units around the globe, while these directors sent the email to their staff. Staff members who chose to participate clicked on the provided link that directed them to the Qualtrics survey, which they filled out.

Measures

Each of the constructs used in the design of this study was operationalized by adopting the existing 7-point (strongly disagree to strongly agree) scales. As several scales included items that were reverse-coded, these items were kept in that form in order to prevent response bias (Kawai & Mohr, 2020). (See Appendix H for the full list of survey items.)

Dependent variable: Turnover intentions were assessed using Colarelli's (1984) 3-item intent to quit scale. The three items included 1) If I have my own way, I will be working for (name of organization) one year from now. (R); 2) I frequently think of quitting my job, and 3) I am planning to search for a new job during the next 12 months. In order to contextualize the instrument, one adaptation was made to one question by way of inserting "my school" in place of

a bank's name. The Cronbach alpha score for the turnover intention scale was 0.766, which is acceptable (Nunnally, 1978). The average rating was 2.623 with a standard deviation of 1.493.

Independent variable: In this study, the servant leadership measure, SL-7, was adapted from prior studies (Liden et al., 2015; Chughtai, 2019). The items were contextualized by replacing the word "leader" with "supervisor/principal" in order to provide clarity for the participants. The seven items included 1) My supervisor/principal can tell if something work-related is going wrong. 2) My supervisor/principal makes my career development a priority. 3) I would seek help from my supervisor/principal if I had a personal problem. 4) My supervisor/principal emphasizes the importance of giving back to the community. 5) My supervisor/principal puts my best interests ahead of his/her own. 6) My supervisor/principal gives me the freedom to handle difficult situations in the way that I feel is best, and 7) My supervisor/principal would NOT compromise ethical principles in order to achieve success. The Cronbach alpha score for the servant leadership scale was 0.859. The average score was 4.954 with a standard deviation of 1.096.

Mediating variable: I measured the SIE's organizational embeddedness variable using the 7-item scale developed by Crosley, Bennett, Jex, and Burnfield (2007). The statements included: 1) I feel attached to this organization. 2) It would be difficult for me to leave this organization. 3) I'm too caught up in this organization to leave. 4) I feel tied to this organization. 5) I simply could not leave the organization that I work for. 6) I am tightly connected to this organization, and 7) It would be easy for me to leave this organization (R). The Cronbach alpha for this measure, 0.909, was determined to be acceptable because it exceeded the widely used cut-off value of 0.70 (Nunnally, 1978). The average was 4.916 with a standard deviation of 1.244.

Moderating variable: I measured the SIE's organizational identification with Mael and Ashforth's (1992) five -item scale. The following statements were included: 1) When someone criticizes my organization, it feels like a personal insult. 2) I am very interested in what others think about my organization. 3) When I talk about my organization, I usually say "we" rather than "they". 4) The organization's successes are my successes, and 5) When someone praises my organization, it feels like a personal compliment. The Cronbach's alpha was 0.837, indicating an acceptable reliability (Nunnally, 1978). The average rating was 5.523, with a standard deviation of 0.596.

I used confirmatory factor analysis (CFA) to confirm the measurement model and the dimensionality of the four multi-item constructs (servant leadership, organizational embeddedness, organizational identification, and turnover intentions) using STATA statistics software. Each of the items exceeded the 0.5 factor loading onto the corresponding latent variables. Due to the high correlations between questions 2 and 7 as well as between questions 3 and 5 on the organizational embeddedness scale, the error terms of those items were added to the structural equation model. The need to correlate these items could be a result of reverse coding and the extreme similarity of the items (e.g., item 2 reads "It would be difficult for me to leave this organization" and item 7 reads "It would be easy for me to leave this organization").

The chi-square for this model was statistically significant ($\chi^2 = 402.717$, $df = 201$, $p\text{-value} = 0.000$). The other goodness-of-fit statistics were satisfactory (comparative fit index [CFI] = 0.905, root mean square error of approximation [RMSEA] = 0.077, standard root mean square residual [SRMR] = 0.06). I compared the goodness-of-fit indices for the four-factor model to a single factor model ($\chi^2 = 1023.87$, CFI = 0.615, RMSEA = 0.152, and SRMR = 0.116) and found the fit for the four-factor model to be more favorable.

Furthermore, I conducted a CFA composed of a three-factor model with organizational embeddedness and organizational identification collapsed and found the fit statistics not to be as favorable as the four-factor model ($\chi^2 = 532.139$, CFI = 0.845, RMSEA = 0.098, and SRMR = 0.071). I also conducted a CFA composed of a three-factor model with organizational embeddedness and turnover intentions collapsed and found the fit statistics not to be as favorable as the four-factor model ($\chi^2 = 469.127$, CFI = 0.875, RMSEA = 0.088, and SRMR = 0.066). Additionally, I calculated the Average Variance Extracted (AVE) to determine convergent validity of the measures, and I found that all AVE values were greater than or equal to the 0.50 cut-off point (Fornell & Larcker, 1981).

To address common method variance (CMV), which is “variance that is attributable to the measurement method rather than to the constructs the measures represent” (Podsakoff, MacKenzie, Lee, & Podsakoff, 2003: 879), I conducted a *post hoc* Harman one-factor analysis to determine whether a single factor largely contributed to the variance in the data (Harman, 1976). The results of the Harman one-factor analysis indicated that there is no common method bias because a single factor was found to extract only 36.51% of the total variance, which is less than the 50% cut-off value (Harman, 1976). While some researchers have expressed concern in regard to the one-factor test, Harman’s one-factor test is the “most commonly used post-hoc approach to managing CMV” and it can detect “biasing levels of CMV” in survey-based research (Fuller, Simmering, Atinc, Atinc, & Babin, 2015: 6). In addition to the Harmon one-factor test, I also followed the advice of Podsakoff, MacKenzie, Lee, & Podsakoff (2003) and used the single-method-factor approach to control for common method bias. Specifically, using my proposed four-factor model, I loaded each item onto their respective factors in addition to loading each item onto a single factor. I ran the estimation in STATA and the model did not converge after

600 iterations. This indicates that there is not a severe issue related to common method variance in this data set.

Furthermore, in a *Journal of International Business Studies* editorial, the editors addressed the issue of CMV in international business research concluding that “sometimes common methods cannot be totally avoided” and suggesting that studies should not be rejected on the grounds of CMV “if the research probes into difficult waters where data of any kind are scarce.” (Chang, van Witteloostuijn, & Eden, 2010: 182). This study of SIEs is being conducted in a population that is unique and very hard to access. Also, Siemsen, Roth, and Oliveira (2010) point out that common method bias would not create an artificial interaction effect, such as the one that is tested in this model. Moreover, if an interaction effect is found it should be interpreted as “strong evidence” that the interaction effect is taking place, despite the potential influence of CMV (Siemsen, Roth, & Oliveira, 2010).

Findings

Table 2.2 reports the means, standard deviations, and Pearson correlation coefficients for the variables used in this study. As shown in Table 2.2, servant leadership was correlated with organizational embeddedness ($r = 0.400$, $p < 0.01$). Furthermore, organizational embeddedness was negatively correlated with turnover intentions ($r = -0.562$, $p < 0.01$). Table 2.2 shows that none of the correlation coefficients of the variables are greater than the cut-off value of 0.70 (Tabachnick & Fidell, 1996), suggesting that my hypothesized model should not have a critical problem with multicollinearity. Furthermore, variance inflation factor (VIF) scores ranged from 1.293 to 1.769 and did not go beyond the cut-off threshold of 10, further indicating that this study does not have critical issues with multicollinearity (Myers, 1990).

To test my hypothesized model, I used the SPSS-PROCESS macro that was developed by Hayes (2013). Through the use of bootstrapping procedures, the SPSS-PROCESS macro utilized path-analytics to examine both moderation and mediation effects at the same time (Hayes, 2013; Preacher, Rucker, & Hayes, 2007).

Table 2.2 Descriptive statistics and correlations between variables

Variables	1	2	3	4	5
1. Organizational Identification	(0.837				
2. Turnover Intentions	-0.421**	(0.766)			
3. Organizational Embeddedness	0.621**	-0.562**	(0.909)		
4. Servant Leadership	0.451**	-0.350**	0.400**	(0.859)	
5. Organizational Tenure	0.322**	-0.182*	0.189*	0.215*	N/A
Mean	5.523	2.623	4.916	4.954	6.53
Standard deviation	0.596	1.493	1.244	1.096	6.41
Minimum	2	1	1	1	0
Maximum	7	7	7	7	25

Notes: N = 168. Alpha values in diagonals. ** significant at the 0.01 level & * at 0.05

Hypotheses 1, 2, 3, and 4 predicted the direct and indirect effects of servant leadership and organizational embeddedness on turnover intentions. As summarized in Table 2.3, the findings of the SPSS-PROCESS moderated mediation analysis (Model 7) with 5,000 bootstrap samples show confidence intervals for Hypothesis 1 - the direct effect of servant leadership on turnover intentions (bootstrapping estimate = -0.2029; 95% bias-corrected CI [-0.3893,-0.0164]); Hypothesis 2 - direct effect of servant leadership on organizational embeddedness (bootstrapping estimate = 1.1790; 95% bias-corrected CI [0.3750,1.9829]); Hypothesis 3 - direct effect of organizational embeddedness on turnover intentions (bootstrapping estimate = -0.6038; 95% bias-corrected CI [-0.7680,-0.4396]); and Hypothesis 4 - indirect effect of servant leadership on turnover intentions through organizational embeddedness (using PROCESS model 4)

(bootstrapping estimate = -0.2742; 95% bias-corrected CI [-0.4155,-0.1556]). All of the confidence intervals exclude zero and therefore these results support hypotheses 1, 2, 3, and 4.

Table 2.3 Results of the moderated-mediation analysis (PROCESS macro, Model 7)

<i>Predictor</i>	<i>Coeff.</i>	<i>SE</i>	<i>t</i>	<i>p</i>	<i>Boot LLCI</i>	<i>Boot ULCI</i>
Mediator variable model: organizational embeddedness						
Constant	-4.7809	1.9893	-2.4033	0.0174	-8.7088	-0.8529
Servant Leadership	1.1790	0.4072	2.8955	0.0043	0.3750	1.9829
Org. Identification	1.6319	0.3722	4.3840	0.0000	0.8969	2.3669
SL X OI	-0.1853	0.0735	-2.5194	0.0127	-0.3305	-0.0401
Dependent variable model: turnover intention						
Constant	6.5967	0.4919	13.4112	0.0000	5.6255	7.5678
Servant Leadership	-0.2029	0.0944	-2.1485	0.0331	-0.3893	-0.0164
Org. Embeddedness	-0.6038	0.0832	-7.2611	0.0000	-0.7680	-0.4396
Indirect effect of X on Y (Model 4)						
	Effect	Boot SE				
Organizational Embeddedness	-0.2742	0.0654			-0.4155	-0.1556

Notes: CI = confidence interval, LL = lower limit; UL = upper limit; 5,000 bootstrapping samples were used; SE = standard error. N = 168

Hypothesis 5 predicted that the indirect relationship between servant leadership and turnover intention via organizational embeddedness was contingent on the level of the SIE’s organizational identification. As summarized in Table 2.4, I used the SPSS PROCESS macro for moderated mediation analysis to test this hypothesis (Hayes, 2013; Preacher et al., 2007). The results of the 5,000 bootstrapping sample showed that the indirect effect of servant leadership on turnover intentions (through organizational embeddedness) was significant at low levels (bootstrapping estimate = -0.2009, 95% CI = [-0.3569, -0.0689]) and moderate levels (bootstrapping estimate = -0.0939, 95% CI = [-0.1934, -0.0078]) of organizational identification.

The moderating effect was not significant at high levels (bootstrapping estimate = 0.0131, 95% CI = [-0.0977, 0.1156]) of SIE’s organizational identification. The results show that for low and moderate levels of organizational identification, the effect of servant leadership on turnover

intentions via organizational embeddedness was significant. These results provide support for the hypotheses presented in this study. The index of moderated mediation was statistically significant (index = 0.1119, 95% CI = [0.0264, 0.2120]).

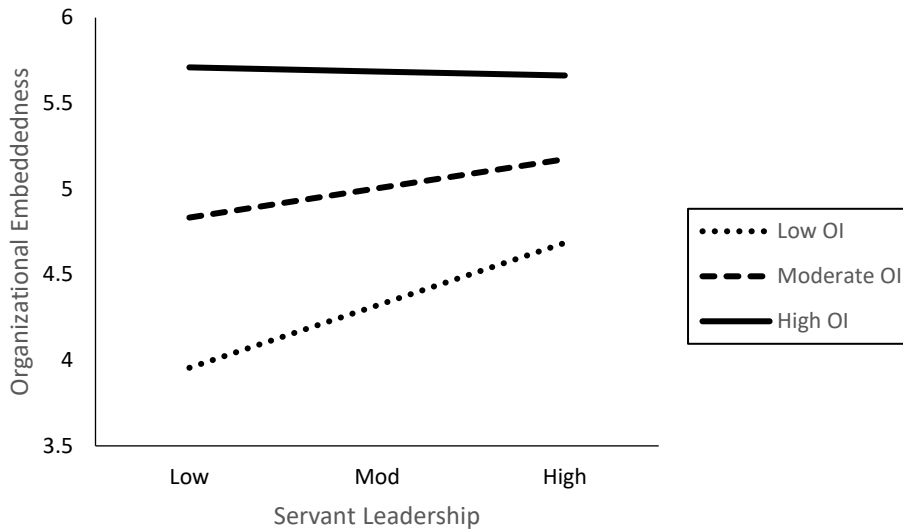
Table 2.4 Conditional indirect effect and index of moderated mediation (PROCES macro, Model 7)

Conditional indirect effects (via organizational embeddedness)	Turnover Intention			
	<i>Coeff.</i>	<i>SE</i>	Bootstrapped CI [95%]	
			<i>LL</i>	<i>UL</i>
Organizational identification (-1 SD)	-0.2009	0.0747	-0.3569	-0.0689
Organizational identification (M)	-0.0939	0.0477	-0.1934	-0.0078
Organizational identification (+1 SD)	0.0131	0.0543	-0.0977	0.1156
	<i>Index</i>	<i>SE</i>	<i>LL</i>	<i>UL</i>
Index of moderated mediation	0.1119	0.0466	0.0264	0.2120

Notes: CI = confidence interval, LL = lower limit, UL = upper limit; 5,000 bootstrapping samples were used; SE = standard error. N = 168

As recommended by Aiken and West (1991) and Cohen et al. (2003), I plotted figures to demonstrate the moderating effect of organizational identification on the servant leadership – turnover intention relationship (see Figure 2.2). In line with Hypothesis 5, Figure 2.2 shows that increased levels of organizational identification influences the positive slope of the regression line to become less steep. In sum, servant leadership has a negative relationship with turnover intentions and this relationship is partially explained through increased levels of organizational embeddedness. However, the influence of servant leadership on organizational embeddedness is moderated by the SIE’s organizational identification in such a way that higher levels of organizational identification weaken the influence of servant leadership on organizational embeddedness.

Figure 2.2 Moderating effect of organizational identification on the servant leadership-turnover intention relationship



Discussion

As of June 2021, a google scholar search for the term “Employee Turnover” yields more than 1.3 million results. Due to the high cost and other organizational outcomes resulting from employee turnover, this topic has garnered much attention from both practitioners and academics alike (Hom, Lee, Shaw, & Hausknecht, 2017). While turnover is expensive in many organizations, it is particularly costly in multinational organizations that employ expatriates (Tharenou, 2013). Although several prior studies have investigated the antecedents that could lead to turnover intentions among SIEs (Ren, Shaffer, Harrison, Fu, & Fodchuk, 2014; Tharneou & Caulfield, 2010; Tharenou, 2015), my systematic literature review, provided in Essay One, revealed there were many gaps in the literature. Specifically, Biemann and Andresen (2010) called for future SIE researchers to examine the influence of leadership on SIEs. As an answer to that call, I designed this study to address the void of research on the effect of leadership on SIEs turnover intentions.

Drawing on the conservation of resource (COR) theory, I proposed that the servant leadership affects SIE's turnover intentions through an increase in SIEs organizational embeddedness. The results of this study provide support for my proposal indicating a significant role of organizational embeddedness as the mechanism by which servant leadership affects SIE's turnover intention. My proposal, grounded in COR theory and empirically supported by the findings of this study, contributes to the research of servant leadership in general and in the context of SIEs in particular, not only by indicating the negative effects of servant leadership on turnover intentions (Kashyap & Rangnekar, 2016; Prakasch & Ghayas 2019), but also by proposing an actual mechanisms through which this relationship occurs. In particular, my findings support the findings of previous studies that individuals who are managed by servant leaders are less likely to possess high levels of turnover intention (Huning, Hurt, & Frieder, 2020). I extend this research by showing that this effect holds in the SIE population and by giving both theoretical basis and empirical evidence for the role of organizational embeddedness as a mediator of this relationship.

Although my findings provide support for the role of organizational embeddedness as the mediator in the relationship between servant leadership and turnover intentions, other mediators such as knowledge sharing, I-deals, and unethical pro-organizational behavior, should be identified and tested in future research. Specifically, my findings show a significant direct effect of servant leadership on turnover intentions that remains significant once I account for the mediating role of organizational embeddedness. Therefore, this partial mediation indicates a limited power of my proposed model to explain how servant leadership impacts SIE turnover intention.

With this study, I also respond to the calls for the examination of individual characteristics serving as potential moderators of the effects of servant leadership (Eva, Robin, Sendjaya, van Dierendonck, & Liden, 2019). I use the frame of social identity theory to propose that organizational identification moderates the influence of servant leadership on organizational embeddedness and thus on turnover intentions. The test of this hypothesis indicated that the effect of servant leadership is stronger for those who have low and moderate levels of organizational identification and that SIEs with high levels of organizational identification do not have a significant relationship between servant leadership and organizational embeddedness. In other words, SIEs that do not possess high levels of organization identification may rely more heavily upon the leadership and resources provided by their servant leaders.

I argue that, SIEs experience a significant loss of resources when they leave their domestic physical and social environment to work abroad for a new multinational organization where they must learn how to navigate their new home and work environments. To manage these significant environmental changes and avoid potential sensebreaking (Kutsch, Djabbarov, & Hall, 2021), SIEs will likely look for feedback from their social environment to make sense in terms of who they are in their new environment.

The SIEs' sensemaking process is particularly effective when it is supported by sensegiving provided by their leader that acts as a servant enhancing the SIE's embeddedness. The SIEs that already possess a strong sense of organizational identification will need less sensegiving provided by their leader because they already understand who they are and what their goals should be in the multinational organization. In contrast, SIEs with low organizational identification will need their leaders to act as servants and provide supporting resources to them. SIEs with low levels of organizational identification are likely to rely on the organizational

servant leadership as an anchor that will support them to acquire additional resources and enhance their embeddedness. Therefore, as evidenced by the results of this study, an SIE's organizational identification plays a significant role in moderating the relationship between servant leadership and turnover intentions via organizational embeddedness. In sum, the findings in this study indicate that the differences in organizational identification among SIEs have a moderating effect on the relationship between servant leadership and turnover intentions through organizational embeddedness.

Practical Implications

The main practical implication of the findings from this research study is the understanding that servant leaders matter for increased SIE retention. More specifically, the impact of servant leaders is critical for SIEs who do not have a high level of organizational identification. Since organizational identification takes place over time and servant leaders help their followers to establish their organizational identification (Eva et al., 2019), the SIE's need for servant leadership is most critical during onboarding and while the SIEs are new to the organization. After the servant leader engenders SIE organizational identification, that servant leader becomes less critical in the long-term retention of the individual SIE. However, because SIEs traditionally have a high rate of turnover, servant leadership continues to play a critical role in onboarding new SIEs in high turnover organizations.

Moreover, the findings of this study indicate that servant leaders are critical for multinational organizations to retain SIEs as unique sources of international global talent that are cost effective, yet the employment of SIEs entails a high risk of turnover. SIE turnover is an undesirable outcome because it leads to loss of social and human capital of the organization (Wang & Lantzy, 2011), decreases individual performance of the retained SIEs (Shaw, Gupta, &

Delery, 2005), and may engender a contagion effect that could spread across SIEs within the organization (Felps, Mitchell, Hekman, Lee, Holtom, & Harman, 2009).

Interestingly, there has been scarce research that informs global managers how to lead SIEs in a way that is likely to reduce their turnover intentions, although international organizations strategically utilize SIEs as a source of skilled labor, this study highlights the need for servant leaders that understand SIE employees' specific needs that are different from the needs of the assigned expatriates. When global managers are developed as servant leaders, they reduce SIE turnover intentions and ultimately contribute to lower costs and stronger market positions of the multinational organization.

Limitations

This study has several limitations. First, this study was focused solely on a single type of leadership practice (i.e., servant leadership) without considering other types of leadership, such as ethical leadership, authentic leadership, and transformational leadership. As these other types of leadership may have some specific impact on SIE's turnover intentions, future research should explore the relevance of these other types of leadership in the context of SIEs. Second, the focus of this study was solely on the individual-level turnover intentions, without considering the effects of leadership on turnover at team and organizational levels (Eva, Robin, Sendjaya, van Dierendonck, & Liden, 2019; Langhof & Guldenberg, 2020). Therefore, future research should empirically test the effects of leadership at the SIE team and organizational levels in international contexts.

Third, another limitation of this study is the sample size. Future researchers should test the model in this study using larger sample sizes in order to enhance the generalizability of the findings. Fourth, our sample consists of the SIEs originating from Western nations. Future

studies should consider SIE samples with individuals from different home countries to assess whether SIEs' culture influences their retention.

Fifth, this study examined only how the relationship between servant leadership and turnover intentions of SIEs is directly and indirectly moderated in a linear way by organizational identification. Future studies could theorize and test non-linear moderation approaches to these relationships (Lin, Law, & Zhou, 2017) considering other theory based psychological, organizational, and country level factors, such as trust, size of organization, and cultural distance, that would contribute to a better understanding of SIE turnover intentions.

Sixth, this study did not account for the non-independence of the participants related to their unit membership because the examined organization that conducts nine surveys annually required anonymity of responses. Due to the sensitive nature of the questions in this study and a desire to protect participant anonymity, the information on the SIEs' direct supervisor was not provided. Future studies should aim to account for non-independence of respondents when conducting research with SIEs.

Finally, the necessity to execute a cross-sectional study did not allow for the inference of causal relationships. Therefore, future research studies should focus on longitudinal relationships to capture a dynamic evaluation of the directionality of the relationships between the constructs investigated in this study.

One additional note on control variables in this study. I took a conservative stance not to include control variables in my model because, due to the limited access to data, complex nature, and multiplicity of contexts, the research fields such as international business lag in the adoption of state-of-the-art practices related to the inclusion of control variables (Nielsen & Raswant, 2018). Moreover, Tharenou (2015) reports that 60-70% of the studies examining self-initiated

expatriates do not include control variables in their analysis. Beyond these general reasons for non-inclusion, there were some specific reasons in my consideration.

Specifically, given that the only candidates for inclusion in the model are the control variables that are “substantively and theoretically related to the other variables in the model” (Wysocki, Lawson, & Rhemtulla, 2020), my concern was that the addition of control variables could impact both the estimated effect sizes and significance levels of other variables (Nielsen & Raswant, 2018), as well as introduce the associated measurement error (Klarmann & Feurer, 2018). Particularly, I was concerned that the use of control variables could “play a purification role when there is risk of confounding bias but should not be introduced in situations where there is risk of overcontrol and endogenous selection bias” (Li, 2021, p. 473). In sum, given ideal circumstances, the use of control variables can improve causal estimates; however, there is a possibility that the addition of these variables can produce either suppression effects or inflation effects due to the endogenous selection bias and overcontrol bias (Elwert & Winship, 2014; Elwert, 2013; Li, 2021; Wysocki, Lawson, & Rhemtulla, 2020).

Relative to my model, although organizational tenure was significantly correlated with the other variables (see Table 2.2), I decided not to include organizational tenure as a control variable of the model mediator (organizational embeddedness) because I was particularly concerned about the overcontrol bias that “is introduced when one includes a variable that sits on the causal path (e.g., a mediator or an intermediator)...Controlling any mediators in the model will undoubtedly bias the causal effect” (Li, 2021, p. 478). Also, the inclusion of tenure as a control of organizational embeddedness might fail to satisfy temporal order by implicitly including “a causal loop (or simultaneity) such that X causes Y and Y causes X simultaneously”

(Li, 2021, p. 485) (e.g., as in the relationship between organizational tenure and embeddedness in my model). Notice that I examine in depth the relevance of tenure in Essay Three.

Conclusion

This study contributes uniquely to the SIE domain by providing the theoretical foundation and the empirical support for the mitigating influence of servant leadership on SIE turnover intentions via their organizational embeddedness. The boundary condition for this influence is the extent of SIE organizational identification. Thus, drawing on COR and social identity theories, my study theoretically explicates and empirically indicates when and how servant leadership affects SIE turnover intentions. Specifically, I find that servant leadership is negatively related to turnover intentions among SIEs, and that this relationship is explained through the mediating mechanism of organizational embeddedness. However, the mediated relationship is moderated by the SIE's level organizational identification such that the mediating effects are not significantly in in SIEs with high levels of organizational identification. In spite of the limitations associated with the current research design, which were mostly imposed by the constraints of collecting data from a single multinational organization, this study provides a novel understanding of turnover intentions among SIEs.

ESSAY THREE: A MANAGERIAL PERSPECTIVE OF SIES IN A MULTINATIONAL ORGANIZATION: AN EXPLANATORY SEQUENTIAL MIXED-METHOD STUDY

Essay Three Abstract

The demand for employment of highly qualified self-initiated expatriates (SIEs) in multinational organizations around the world has increased due to rapid growth of opportunities in the challenging environments of emerging economies (Haslberger & Vaiman, 2013; Doherty, 2013). Recognizing this trend over the past two decades, researchers have identified the individual, organizational, and environmental antecedents and outcomes associated with the SIE phenomenon (Doherty, 2013; Cerdin & Selmer, 2014; Andresen, Pattie, & Hippler, 2020). What is curiously missing, however, is the research addressing how organizations and their managers perceive the role of SIEs in multinational organizations. To address this void, I examined and report in this Essay Three the managerial perspective on the role of SIEs in multinational organizations.

A perspective is defined as a “a mental view of the relative importance of things” (Oxford American Dictionary & Thesaurus, 2003, p. 1114), or as a “subjective evaluation of relative significance: a point of view” (American Heritage 1996, p. 1352). What is included in perspectives are judgements concerning, “relative importance, preservation of interrelationships, and a coherence in the form of a mental view” (Weick, 2017, p. 3). Weick (2006) suggested that “Beliefs”, “Evidence”, and “Action” are the elements that make up the infrastructure beneath judgements that inform an individual’s perspective. I examine these elements both quantitatively and qualitatively in a multinational organization employing SIEs.

Introduction

The purpose of this study is to examine how subsidiary unit managers assess and evaluate the factors that influence retention of SIEs in their multinational organization. I have collected the data for examination from a single organization's archival sources and surveyed its subsidiary managers. To present the findings of my examination, I have organized this Essay Three as follows. First, I present the sequential explanatory mixed-methods research design used in this study. Second, I provide an exploratory longitudinal quantitative analysis of the archival data from a multinational organization employing SIEs to identify the factors that may influence retention from the managerial perspective. Third, I conduct a systematic review of the SIE qualitative studies, focusing particularly on those addressing the managerial perspective, to validate the influential factors identified in the qualitative analysis of the archival data. Fourth, I combine the insights from the quantitative findings and those from the systematic review to inform my design, of the qualitative stage of the study, which involved developing an interview protocol, conducting semi-structured interviews with SIE unit-level managers, and analyzing the interview transcripts to identify managerial perspectives on SIE retention. Finally, I outline the study's limitations and implications.

Sequential Mixed-Method Design

To conduct the study described in this Essay Three, I utilize a sequential explanatory mixed-methods research design that combines quantitative and qualitative stages of research with the aim to uncover the managerial perspective on SIE retention in multinational organizations. This sequential approach is unique because it allows for the insights from one stage of research to inform the design of the subsequent stage (Wei & Lin, 2017), thus increasing the depth and breadth analyzing SIE retention. Using this mixed methods research design, I was

able to “triangulate” my initial findings from the quantitative stage (Creswell & Plano Clark, 2017; Webb, Campbell, Schwartz, & Sechrest, 1966; Stake, 2010), and in the subsequent qualitative stage, develop a deeper understanding of how subsidiary managers in a multinational organization perceive the role factors influencing SIE retention.

I recognize that in the past researchers were categorically divided about the acceptance of the mixed-methods design due to the fundamental ontological differences that underpin the realist quantitative and interpretivist qualitative paradigms. On the one hand, researchers that subscribe only to the realist/positivist paradigm believe that objective knowledge can be uncovered through discovery of “true facts” (Roeh, 1989) which are revealed from the application of objective and detached quantitative methods. The users of these methods typically collect data by administering questionnaires and conduct statistical analysis to assess whether the data is reliable, valid, and representative. On the other hand, researchers that subscribe only to the constructivist/interpretivist paradigm believe that reality is constructed by individuals in terms of ascribed meanings. Therefore, it is necessary to examine how individuals act on these meanings by using qualitative methods, such as interviews and observations (Wei & Lin, 2017).

Fortunately, with the current wide adoption of a pragmatist approach to answering research questions, the majority of social science researchers are increasingly rejecting the notion that research designs must fall categorically within either realist or interpretivist paradigms. In other words, these approaches can be used in tandem based on their shared values of engaging in critical inquiry, improving and understanding the human condition, and understanding that phenomena can be explicated by more than one way (Tashakkori & Teddlie, 1998). In line with this view, my study utilizes the pragmatic approach employing a mixed-method design with the goal to explore the managerial (i.e., organizational) view of SIE retention.

I chose the sequence of a two-stage explanatory mixed-method design in which the quantitative data collection occurred before engaging in the qualitative data collection (Creswell & Plano Clark, 2017). I chose this specific sequence in the design to combine my insights from the exploratory quantitative stage with those from my systematic review of qualitative SIE studies so that these combined insights could inform my design of the qualitative explanatory stage (Wei & Lin, 2017; Maruyama & Ryan, 2014). I used archival data in the quantitative stage because the archival data represent traces of “Evidence” that informs the managerial perspective (Weick, 2017). Moreover, archival research has exhibited growth in popularity as these unique data sets are derived from untapped, fine-grained, and comprehensive primary documents (Brown, 2019).

With this choice of design sequence, I followed the prescribed six steps of the explanatory sequential mixed-method design in this study (Hayes, 2020). The first step of the sequence involves acquiring quantitative data. I obtained the archived quantitative data from the multinational organization’s archives. The second step is to analyze the quantitative data with the aim to reveal the relationships between the factors represented in the archival data. In this study, I complemented the second step with a systematic review of the qualitative SIE studies focusing on the relationships between factors that had been uncovered as significant in the quantitative stage. In the third step, I combined the information gained through the systematic review and the quantitative findings to develop an interview protocol that could help explain in detail the findings from the quantitative data analysis. The fourth step is to collect the qualitative data through interviewing the organization’s subsidiary unit managers. The fifth step is to analyze the transcripts of the interviews. The sixth and final step is to integrate the findings from both the quantitative and qualitative procedures with the aim to propose a managerial perspective on SIE

retention in a multinational organization. Overall, the use of this sequential mixed-method research design in this study yielded richer findings than would have been those gained by an exclusive use of either quantitative or qualitative method.

Quantitative Stage of the Sequential Mixed-Method: Archival Data Analysis

I used archival data in the first, quantitative stage of my study. Archival data refers to the evidence consisting of “traces, clues, and fragments” of historic documents describing organizational actions. Organizations typically archive documents of relevance for the managerial perspective (Weick, 2017). In this study, I focused on the archived evidence describing the factors that the multinational organization viewed as important for SIE retention. In the following paragraphs, I describe not only the archival data on which I focused but also the multinational organization from which it came, paying particular attention to the factors that managers perceive to be important.

The quantitative stage of this study is based on archival records of a U.S.-headquartered multinational organization that operates 15 subsidiary units employing SIEs in 13 countries around the world. I conducted this stage of my research study owing to the fact that the management of this organization gave me access to its archival resources, particularly to those relevant to assess the factors that the organization’s subsidiary managers view to influence SIE retention. This U.S.-headquartered multinational organization is a network of English-speaking international schools which operate based on the U.S. educational system. The schools, which are spread out in 13 countries around the globe, employ primarily self-initiated expatriate teachers and administrators. The organization’s headquarters provides operational, human resource management, and warehousing services to each of the schools. The fact that is relevant for this study is that the top management team conducts and archives annual reviews of each

subsidiary unit in order to assess what they perceive to be critical areas of interest. As I was given access to the past administered and archived Annual Review (AR) assessments, I have organized them in Table 3.1 showing the schools (left column), years (top row), number of respondents (indicated in the cells) that completed the AR in a particular school each year, along with totals and overall response rates.

Table 3.1 Overview of Available Archival Data

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
AIS	15	30	35	30	30	27	24	15	X	X
AVA	8	8	13	12	X	X	X	X	X	X
BA	13	X	X	X	X	X	X	X	X	X
BAIS	18	40	45	43	31	21	11	24	22	25
BIIS			2	6	X	X	X	X	X	X
BIS	11	12	11	14	17	15	13	14	11	9
CCS						11	X	X	X	X
CAR/ICSC	10	16	17	16	12	14	15	11	X	X
HIS	16	27	24	26	22	19	22	20	16	13
ICAN	10	15	15	13	12	14	10	8	8	7
ICSP/PICS	14	16	16	15	19	20	19	20	23	21
ICSSIN	29	61	61	65	59	57	61	32	50	45
ISK	18	30	35	28	X	X	X	X	X	X
KIA	19	53	43	40	37	22	23	19	37	X
MCCA						6	7	9	X	X
KL			5	8	7	-	-	-	26	31
LIM/ICSL	20	27	33	33	34	24	29	20	19	22
OIS	15	31	24	24	25	26	25	33	34	43
PRN										16
RIO/RIS	12	40	36	X	X	X	X	X	X	X
SUR/IAS	13	20	7	X	X	X	X	X	X	X
UJB/ICSU	23	30	27	24	26	22	21	17	20	18
WNS	17	33	36	35	28	29	24	29	26	28
YISS	62	89	88	102	95	102	97	90	91	84

Total # Schools	19	18	20	18	15	16	15	15	13	13/14
Total Responses	343	578	573	534	454	429	401	361	383	362
Non Responses				108	89	86	119	139	97	107
Response Rate				79.78%	80.40%	79.95%	70.32%	61.50%	74.67%	70.44%

In Table 3.1, red cells with “X” indicate that the school shut down, therefore data is not available for that school/year. Schools that were either opened or closed within the four years under review (2017-2020) were not included in the analysis. Grey cells indicate that the school had not opened yet. Orange cells indicate that the school was not operational in that year (due to school permit restrictions). The light blue cell indicates that the school did not report their AR results for that given year. The total number of the archived AR responses on any given year is between 343 and 578 with the total response rate reflecting 61.5% - 80.4%.

The AR responses are based on the questions that the managers perceive to be important for each school in terms of the SIE employees’ experiences. Table 3.2 summarizes the questions that have been included in the AR from 2011-2020. The first column (Q#) identifies the questions’ order found within the 2019-2020 survey that was administered by the organization. The second column (Years Available) identifies how many years that question was available within the data set. The third column (Question) contains the actual question included in the organizational survey.

Table 3.2 Annual Review Question Summary

Q #	Years Available	Question
1	10	I am able to keep a good balance between my personal life and professional duties.
2	10	I am personally growing in my spiritual walk with the Lord.
3	4	While serving at the school, I have been able to make and maintain friendships within the NICS/Oasis community.
4	8	I have a great sense of fulfillment in regard to my ministry/job.

5	10	I feel I am doing well in adapting to the host country, culture, and the local community.
6	9	Which of the following best describes the way your local church or weekly fellowship group would speak of your involvement.
7	10	The salary and benefits provided by my school along with the support I have already raised affords me the ability to live here without needing to raise additional support.
8	10	Students' lives at this school are being greatly influenced for Christ's Kingdom.
9	10	The school operates at a high degree of educational professionalism.
10	10	Overall, the faculty at our school displays spiritual maturity.
11	7	The Member Care team at my school is an encouragement to our staff.
12	10	Being a member of the NICS/Oasis network is clearly important and evident at our school and reflected by our leadership team.
13	9	For the Gospel of Christ, to the greatest extent possible in your country, we as a school and individuals in our school influence host country nationals outside the school community.

This AR questionnaire, which is used in this multinational organization as a measurement tool designed for managerial purposes, contains a total of thirteen questions and many of these questions have changed over time. For example, Table 3.3 indicates how one of the questions changed over time and specifies where the question was asked within the survey, the degree of change within the question, and comments about the changes themselves. After reviewing and assessing of each of the questions in the AR, as well as the additional information provided from company records, I decided that only the data archived from 2017-2020 should be retained for my quantitative analysis because the questions asked in the years prior to 2017 had been significantly changed. In terms of content, I focused primarily on the questions related to the retention of SIEs.

Table 3.3 Review and Evaluation of Question 3 from Annual Review

Year	Q #	Question	Degree of Change	Change
2020	3	3. While serving at the school, I have been able to make and maintain friendships within the [organization's]	None	

		community.		
2019	3	3. While serving at the school, I have been able to make and maintain friendships within the [organization's] community.	None	
2018	3	3. While serving at the school, I have been able to make and maintain friendships within the [organization's] community.	None	
2017	3	3. While serving at the school, I have been able to make and maintain friendships within the [organization's] community.	Major	Deleted "and/or the local community.
2016	3	3. While serving at the school, I have been able to make and maintain friendships within the [organization's] community and/or the local community.	None	
2015	3	3. While serving at the school, I have been able to make and maintain friendships within the [organization's] community and/or the local community.	Major	Removed the word "close" before "friendships; Removed "on the field"; Added "While serving at the school"; Added "within the [organization's] community and/or the local community.
2014	3	3. I have been able to make and maintain close friendships on the field.	None	
2013	3	3. I have been able to make and maintain close friendships on the field.	Major	Added the word "make.
2012	4	4. I have been able to maintain good, close friendships on the field.	None	
2011	4	I have been able to maintain good, close friendships on the field.	-	

Evaluation of Question 3: In the AR for 2019–2020-year, this question read, "While serving at the school, I have been able to make and maintain friendships within the [organization's] community." This question, which has been included in the survey for 10 years, has undergone three major changes. The nature of the changes has been substantial because they influenced the underlying information. The responses recorded in years 2017 - 2020 from Question 3 are included in the analysis. For the review and evaluation of all annual review questions, see Appendix I.

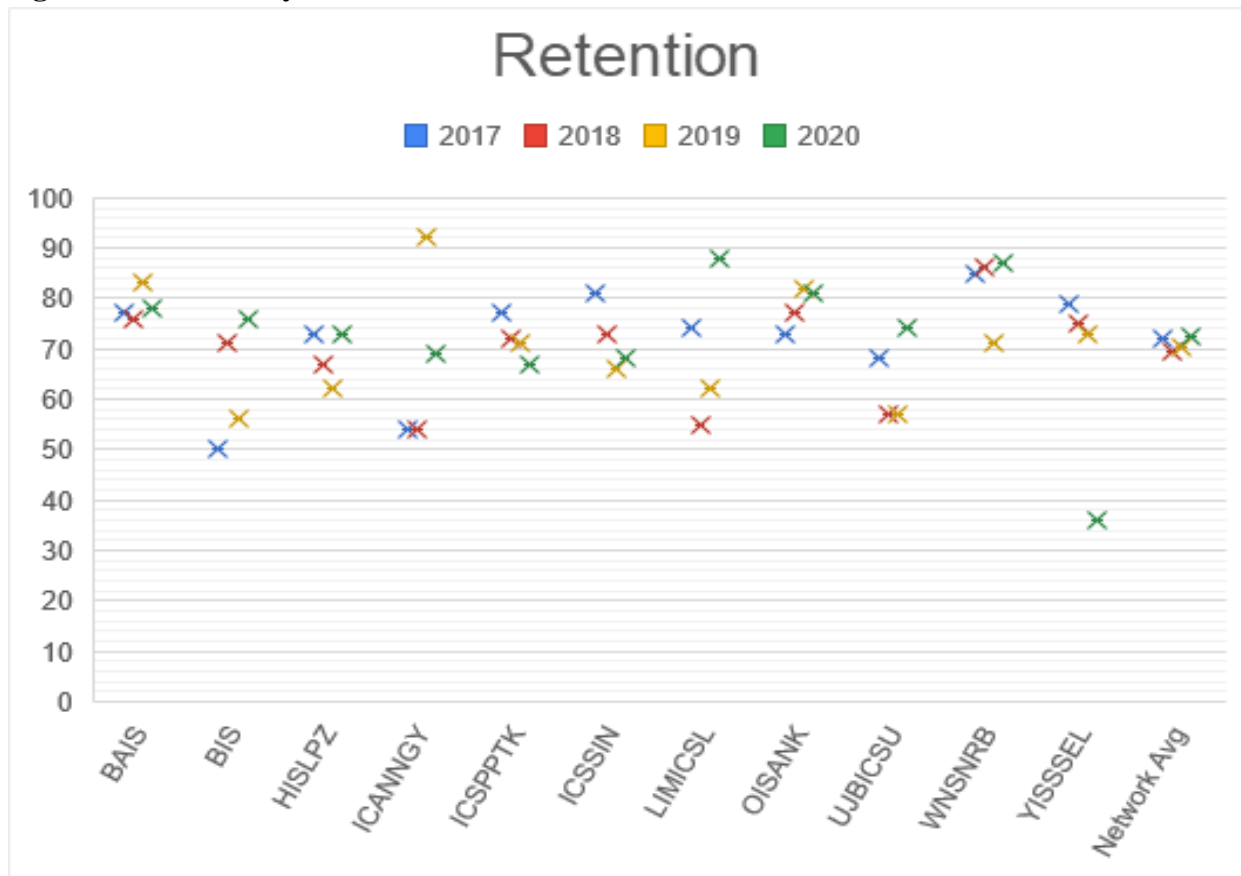
In addition to the archived AR data, I was also given company records concerning objective data at the subsidiary unit level that the multinational organization's managers thought

important to track over time. The organization's records included information about student body citizenship, number of expatriate students in each sub-unit, parent vocation, religious preferences, student tenure, SIE tenure, SIE organizational tenure, SIE occupational tenure, SIE professional certifications, educational attainment, and student placement.

Retention Rates of SIEs in Subsidiary Units

In addition to the review of the archived AR questions related to the SIE retention, I also reviewed the archived network and subsidiary retention rates at the subsidiary (i.e., school) level from 2017-2020 (Figure 3.1). The average network retention rate across the schools in 2017 was 72%, in 2018 it was 69%, in 2019 it was 70% and in 2020 it was 72%. The fact that there is only a 3% variation in average network retention across all four years indicates that the network-level retention is stable over time. Specifically, retention at the subsidiary level from year to year ranged from 36% in 2020 at YISSSEL to 92% in 2019 at ICANNNGY (See Figure 3.1).

Figure 3.1 Subsidiary Unit Retention Rates



Research Question Guiding the Quantitative Stage of the Study

My review of the questions included in the AR and the information contained in the other archival materials revealed that the multinational organization explicitly tracked not only the SIE retention at the level of each subsidiary unit but also factors that the management perceived as significantly related to SIE retention. The traces of organizational action, in the form of archiving the AR and the supporting materials, reflect the factors of influence on the SIE retention viewed as relevant from the managerial perspective. Therefore, I conducted the quantitative stage of this study by exploring the above-described archival data to uncover the factors that managers perceived to be important for the SIE retention. Specifically, my proposed research question for the quantitative stage of this study was:

At the organizational unit level, what factors may have a significant impact on SIE retention in the units of a multinational organization?

The Quantitative Data Set Used in the Quantitative Stage

The archival data provided by the multinational organization to me contained not only responses to the thirteen questions in the AR provided above, but also subsidiary unit-level information on the SIE retention at the subsidiary unit level for the 2017-2020 period of time. This format of archival data allows for a longitudinal research, which Ployhart and Vandenberg (2010) define as, “research emphasizing the study of change and containing at minimum three repeated observations (although more than three is better) on at least one of the substantive constructs of interest” (p. 97).

The data set that I have constructed from the archival sources contained information related to SIEs from the 11 schools over the 4-year period of time between 2017-2020. As the questions administered in the annual reviews within this time frame did not change substantially the associated scores can be compared across years. I used the scores from four repeated observations in the archived data, which are used as proxies for the constructs of interest in this study: occupational embeddedness, organizational embeddedness, cross-cultural adjustment and retention. These constructs were selected due to their relationship with SIE retention.

For example, embeddedness is a concept that has traditionally been measured by self-report measures, particularly in the organizational context when it is conceptualized as organizational embeddedness (Ng & Feldman, 2011 & 2013; Crossley, Bennett, Jex, & Burnfield, 2007; Mitchell, Holtom, Lee, Sablinski, & Erez, 2001; Peltokorpi, Allen, & Froese, 2014). However, three studies of organizational embeddedness include an objective measure of this construct, and all three of them use tenure in the organization as a proxy for organizational embeddedness (Slack, Cope, Jensen, & Tickamyer, 2017; McLaughlin,

Mewhirter, Wright, & Feiock, 2020; Mitchell, Holtom, Lee, Sablynski, & Erez, 2001). Ng and Feldman (2007) write that work hours indicate a level of human capital invested and that individuals who invest long work hours will expect greater future rewards in return. Consistent with this approach, I use tenure in the occupation as a proxy for *occupational embeddedness*.

In contrast to occupational embeddedness, organizational embeddedness refers to the fit, links, and sacrifice that an individual associates with their relationship with the organization. The fourth question in the Annual Review states, “I have a great sense of fulfillment in regard to my ministry/job.” Employees who experience higher levels of achievement and are subsequently rewarded for that achievement will sacrifice more if they no longer receive those benefits (Ng & Feldman, 2007). The great sense of fulfillment that is assessed in question four relates to the “sacrifice” dimension of embeddedness. Therefore, in line with Qaiser, Gulzar, Hussain, and Shabbir (2015), I use question four as a proxy for *organizational embeddedness*.

The construct of cross-cultural adjustment has also been found to influence SIE retentions. In the AR, question five states, “I feel I am doing well adapting to the host country, culture, and local community.” I use this question as a proxy for *cross-cultural adjustment* because it aligns with Black’s (1990) definition, “the degree of psychological comfort and familiarity that the individual has for the new environment” (p.11). The organizational *retention* of SIEs was provided by the multinational organization in the archival data.

My longitudinal analysis of this data set was conducted at multiple levels as the individual SIE data was aggregated to the school (subsidiary) level. Specifically, I used the restricted maximum likelihood estimation method (REML) along with a Kenward-Roger correction. This method of analysis is recommended in studies where clustering (either by nature of cross-sectional data collection or longitudinal repeated measures) occurs and sample

size is small (Raudenbush & Bryk, 2002; Snijders & Bosker, 1993). One of the reasons why this specialized MLM statistical technique is required under these conditions is the violation of the independence assumption, which is assumed under the general linear model, due to the clustering of the data (McNeish, 2017) and the issue of small sample size encountered in studies that employ multilevel models.

The issue of small sample size typically occurs when researchers are able to collect ample data at Level-1, but, when the data are aggregated to Level-2, the study then falls into the “small sample” category (McNeish, 2016). In other words, it is the Level-2 sample size that determines whether or not the model will be impacted by issues related to small samples (Snijders & Bosker, 1993) which can include downwardly bias variance components and fixed effect standard error estimates resulting in increased Type-I errors (McNeish, 2017). To address these issues, Maas and Hox (2005) conducted a seminal study which explored requisite sample sizes needed in order to employ multilevel models. Subsequently, Bell et al. (2014) studied the extent to which the estimates from small sample sizes could be trusted, while McNeish & Stapleton (2016) reviewed the methods used for multilevel models and examined small sample corrections and comparisons, and Huang (2017) compared the small sample corrections in conjunction with multilevel bootstrapping. The insight derived from these studies is that when a study has a Level-2 sample size under 50, the results are susceptible to small estimate biases and increased error rates. Moreover, when the Level-2 sample size is below 25, the estimates “will almost certainly encounter these issues if precautions are not taken” (McNeish, 2017: p. 2).

One way to address the Level-2 small sample size issue is to employ the restricted maximum likelihood (REML) estimation because researchers have shown that it can address small sample properties and will perform well even when Level-2 sample sizes are in the single

digits (Ferron, Bell, Hess, Rendina-Gobioff, & Hibbard, 2009; McNeish & Stapleton, 2016). In effect, REML first separates the variance components from the estimated fixed effects which leads to more reliable estimates of variance components thus improving the standard error estimates of the fixed effects. Next, through the use of generalized least squares, which can account for data that is clustered, REML estimates the fixed effects (McNeish, 2017).

While the use of REML does help reduce bias in effect estimates in small samples, additional actions are required to address the inflated Type-1 error rates. In particular, the Kenward-Roger correction (Kenward & Roger, 1997) has been put forward as a recommended best practice for maintaining nominal Type-1 error rates (McNeish & Stapleton, 2016). In sum, the primary objective of the Kenward-Roger correction is to, “first correct the fixed effect standard error estimates in order to reduce the reliance on asymptotics” (McNeish, 2017: p.17). The outcome of this first step results in more precise t-statistics. The second step of the Kenward-Roger correction, “provides an alternative procedure for degree of freedom calculation in order to refine p-values to improve inferential decisions” (McNeish, 2017; p. 17). Therefore, in the quantitative analysis stage of Essay Three, I employed the REML with the Kenward-Roger correction in order to understand the relationships between the concepts contained in the archive data. The quantitative results are provided and explained in the subsequent section.

Analysis of the Data Used in the Quantitative Stage

The data used in the REML analysis with the Kenward-Roger correction for this study come from 1,274 Level-1 observations clustered within 11 Level-2 sites over a 4-year period of time. There were an average of 29 Level-1 observations that were aggregated to each of the Level-2 sites and the total number of Level-1 observations in year 2017 = 332, in 2018 = 307, in 2019 = 320, and in 2020 = 315. The exploratory analysis returned one significant relationship

and one relationship that approaches significance, both of which are explained below.

The first significant relationship found was between question 4 and occupational embeddedness. Essentially, this relationship is related to the sense of fit an SIE experiences when performing their job (organizational embeddedness) and their tenure in their occupation (occupational embeddedness). According to the analysis, after using the REML mixed procedure with the Kenward-Roger correction, model convergence criteria were met after 10 iterations. Fit statistics include a -2 Res Log Likelihood of -7.5, AIC = -3.5, AICC = -3.2, and BIC = -2.7. The solution for the fixed effects (See Table 3.4) as well as the type 3 tests of fixed effects (See Table 3.5) are presented below.

Table 3.4 Solution for Fixed Effects (Q4)

Solution for Fixed Effects					
Effect	Estimate	Standard Error	DF	t Value	Pr > t
Intercept	4.1147	0.04536	37.1	90.70	<.0001
year_c2017	0.000064	0.02425	37.1	0.00	0.9979
TeachTen_Meanc2_66	0.6856	0.3119	37.1	2.20	0.0343
year_c2017*TeachTen_Meanc2_66	-0.1120	0.1667	37.1	-0.67	0.5057

Table 3.5 Solution for Type 3 Fixed Effects (Q4)

Type 3 Tests of Fixed Effects						
Effect	Num DF	Den DF	Chi-Square	F Value	Pr > ChiSq	Pr > F

year_c2017	1	37.1	0.00	0.00	0.9979	0.9979
TeachTen_Meanc2_66	1	37.1	4.83	4.83	0.0279	0.0343
year_c2017*TeachTen_Meanc2_66	1	37.1	0.45	0.45	0.5015	0.5057

The Type 3 Tests of Fixed Effects table shows that there is a significant relationship ($p = 0.0343$) between occupational embeddedness and organizational embeddedness. More specifically, the interpretation for question 4 is: for each one unit increase in school average in teacher mean tenure the school mean is expected to increase by .69. In sum, those schools that employ SIEs with higher levels of occupational embeddedness also have a higher level of organizational embeddedness within their staff.

The second relationship that approaches significance was found between question 5, which states, “I feel I am doing well in adapting to the host country, culture, and the local community” and the average number of years that SIEs have been employed in their occupation. Question 5 reflects the cross-cultural adjustment that SIEs experience, while occupational tenure reflects the occupational embeddedness experienced by SIEs. The analysis of the relationship between these two constructs, after allowing for systematic variance while using the REML mixed procedure with the Kenward-Roger correction, shows that the model convergence criteria were met. Fit statistics include a -2 Res Log Likelihood of .6, AIC = 4.6, AICC = 5.0, and BIC = 5.4. The solution for the fixed effects (See Table 3.6) as well as the type 3 tests of fixed effects (See Table 3.7) are presented below.

Table 3.6 Solution for Fixed Effects (Q5)

Solution for Fixed Effects

Effect	Estimate	Standard Error	DF	t Value	Pr > t
Intercept	4.3028	0.07440	15.4	57.83	<.0001
year_c2017	-0.00873	0.02460	31	-0.35	0.7252
TeachTen_Meanc2_66	-0.06344	0.5115	15.4	-0.12	0.9029
year_c2017*TeachTen_Meanc2_66	0.2983	0.1691	31	1.76	0.0876

Table 3.7 Solution for Type 3 Fixed Effects (Q5)

Type 3 Tests of Fixed Effects						
Effect	Num DF	Den DF	Chi-Square	F Value	Pr > ChiSq	Pr > F
year_c2017	1	31	0.13	0.13	0.7228	0.7252
TeachTen_Meanc2_66	1	15.4	0.02	0.02	0.9013	0.9029
year_c2017*TeachTen_Meanc2_66	1	31	3.11	3.11	0.0777	0.0876

The Type 3 Tests of Fixed Effects table shows that there is a relationship approaching significance ($p = 0.0876$) between cross-cultural adjustment and occupational embeddedness. More specifically, the interpretation for the interaction model in question 5 is: schools with an average amount of tenure are not expected to improve over time ($b = -.009$, $p = .72$). However, as the school-mean teacher tenure increases, the amount that the mean of cross-cultural adjustment improves over time increases by $.30$, $p = .09$ (so not quite significant,

but borderline). In sum, there is a relationship between cross-cultural adjustment and occupational embeddedness among SIEs.

The limitation of the analytical method applied in the quantitative stage of this study is that the findings are sample-specific and not generalizable. Therefore, I conducted a systematic review of the qualitative SIE studies to assess whether their findings resonate with the findings from the quantitative stage. This resonance would enhance the validity of the interview protocol that I developed for the qualitative stage of this study.

Introduction and Overview of Qualitative SIE Studies

To prepare for the qualitative stage of this study, I conducted a systematic review of the extant qualitative SIE studies. Having used the selection criterion for a systematic review, which are described in Essay One, I identified 93 qualitative SIE articles with the potential to qualify to be included in this review. As the primary aim of this qualitative review was to understand what researchers had learned empirically from studying SIEs, I removed those articles that did not report the analysis of primary data. Specifically, upon my closer reading of each of the articles, I removed 12 articles which did not report empirical research because they were specialized reviews. After removing several additional articles from the set due to their conceptual (15), editorial (3), and unrelated (7) nature, I identified the final set of 56 qualitative empirical studies.

The studies selected for this qualitative review were published in 24 different journals. Three journals in particular (*Journal of Global Mobility*, *International Journal of Human Resource Management*, and *Career Development International*) published 45% of all of the qualitative articles focused on SIEs. The next six journals (*Thunderbird International Business Review*, *Asia Pacific Journal of Human Resources*, *Journal of Management Development*,

Human Resource Development International, International Studies of Management and Organization, and Personnel Review) published an additional 29% of the articles in this set. The remaining 15 journals each published a single qualitative article, which made up the remaining 26% of the qualitative articles. In other words, the distribution of qualitative articles in the SIE domain is skewed towards a few journals, as shown in Table 3.8 below.

Table 3.8 Concentration of SIE Qualitative Studies in Journals

Journal Title		
Journal of Global Mobility	12	21%
International Journal of Human Resource Management	7	13%
Career Development International	6	11%
Thunderbird International Business Review	4	7%
Asia Pacific Journal of Human Resources	3	5%
Journal of Management Development	3	5%
Human Resource Development International	2	4%
International Studies of Management and Organization	2	4%
Personnel Review	2	4%
British Journal of Middle Eastern Studies	1	2%
Critical Perspectives on International Business	1	2%
Current Psychology	1	2%
Equality, Diversity and Inclusion	1	2%
European Management Journal	1	2%
Human Resource Management Journal	1	2%
International Migration	1	2%
Journal of Cross-Cultural Psychology	1	2%
Journal of Workplace Learning	1	2%
Journal of World Business	1	2%
Management Decision	1	2%
Prometheus (United Kingdom)	1	2%
Public Policy and Administration	1	2%

South Asian Journal of Human Resources Management	1	2%
Journal for Personnel Research	1	2%
Total	56	

The researchers, who reported their findings in these 56 qualitative SIE articles, utilized a variety of sampling techniques to gather primary data for their studies. The most common technique that they used was the snowball sampling method, which was used in 34% of the studies. The purposive sampling technique was used in 29% of the studies, followed by convenience sampling (6%), maximal variation (3%), theoretical sampling (3%), and four other sampling techniques (representative sampling, stratified random sampling, non-probability sampling, and criterion sampling) that were used only in one study each. Additionally, there were 12 studies that reportedly used multiple sampling techniques (most frequently purposive sampling combined with snowball sampling), as well as 13 studies that did not report their sampling technique. The summary of all sampling techniques used in qualitative SIE studies is shown in Table 3.9.

Table 3.9 Sampling Techniques Used in SIE Qualitative Studies

Table 3.2 Sampling Techniques		
Snowball Sampling	23	34%
Purposive Sampling	20	29%
None Found	13	19%
Convenience Sampling	4	6%
Maximum Variation	2	3%
Theoretical Sampling	2	3%
Other*	4	6%

*Other: studies use these sampling types only once: Representative Sampling, Stratified Random Sampling, Non-probability Sampling, and Criterion Sampling.
 ^Additionally, there were 12 articles that used multiple sampling strategies.

In addition to the varying sampling techniques, the total number of participants interviewed in each study varied between 4 and 123. Specifically, 23% of the studies used data obtained from the interviews of between four and fourteen participants. Moreover, 36% of the studies reported the sample size to include between 15 to 24 interviewee participants, 27% with 25 to 49 participants, and 14% with 50 or more participants. In sum, nearly 60% of the qualitative studies utilized primary data collected from less than 24 participants, as shown in Table 3.10. This summary indicates that the qualitative studies of SIEs are based on a relatively small number of participants that make up the larger pool of SIEs.

Table 3.10 Number of Study Participants

Number of Study Participants		
Between 4 -14	13	23%
Between 15 - 24	20	36%
Between 25 - 49	15	27%
50 or More	8	14%
Total	56	

Researchers collected qualitative data from the participants primarily through interviews. Over half (54%) of the studies employing interviews used the semi-structured interview design. The alternative interview designs that were used included unstructured interviews (5%), focus groups (4%), conversational interviews (4%), biographical narrative interview (1%), diary analysis (1%), iterative questioning (1%), narrative-biographical problem-centered interview (1%), and informal unstructured interview (1%). No interview design data was reported in 14%

of the studies. The Table 3.11 below summarizes the interview designs used in the selected qualitative SIE studies.

Table 3.11 Interview Designs

Interview Designs		
Semi-Structured	30	54%
None Found	14	25%
Unstructured	3	5%
Focus Group	2	4%
Conversational Interview	2	4%
Other*	5	9%
Total	56	
*Other: studies use these interview designs once: Biographical Narrative Interviews, Diary Analysis, Iterative Questioning, Narrative-Biographical Problem-Centered Interviews, and Informal Unstructured.		

The interviewed SIE participants were selected either from multiple host countries or from a single host country. While the participating interviewees in 17 studies lived in multiple host countries, the participating interviewees in seven of the studies lived only in China, in five studies only in France, and in three studies in Malaysia, Qatar, and UAE, respectively. Each of the following countries had two studies focused on SIEs located solely in the host nation: Denmark, Netherlands, and the United Kingdom, while several single studies selected interviewees from each of the following countries: Belgium, Brazil, Canada, Germany, Greece, India, Luxembourg, Singapore, South Africa, South Korea, Spain, and Turkey. Table 3.12 showing the countries in which SIEs have been studied indicates the concentration of research on countries of the Global North.

Table 3.12 Host Countries of SIE Interviewees

Host Countries of SIE Interviewees		
China	7	13%
France	5	9%
Malaysia	3	5%
Qatar	3	5%
UAE	3	5%
Denmark	2	4%
Netherlands	2	4%
United Kingdom	2	4%
Other*	12	21%
Multiple**	17	30%
Total	56	
<small>*Other studies sample SIEs from solely from: Belgium, Brazil, Canada, Germany, Greece, India, Luxembourg, Singapore, South Africa, South Korea, Spain, and Turkey. **Multiple: the sample of SIEs from these 17 studies resided in multiple host countries.</small>		

While the interviewed SIEs were dispersed across countries, they were not equally dispersed across the industry settings in which SIEs worked. For instance, in 61% of the studies, researchers selected participants from multiple industries, but neither reported the mix of these industries nor elaborate on the type of industries that have been studied. Three studies were conducted in academic settings, while two studies were conducted in sports and finance settings, respectively. Seven additional studies were conducted with samples of participants from a single industry (construction, engineering, consumer electronics, professional services, hospitality, head hunting, and oil and gas). Fourteen percent of the studies did not report the industry(ies) from

which the participants came. Table 3.13 shows the different settings of the selected SIE qualitative studies.

Table 3.13 Industry Setting of SIE Studies

Industry Settings of SIE Studies		
Academic	3	5%
Sports	2	4%
Finance	2	4%
None Found	8	14%
Other*	7	13%
Multiple**	34	61%
Total	56	
*Other industries include one article solely from: Construction, Engineering, Consumer Electronics, Professional Services, Hospitality, Head-hunting, and Oil & Gas.		
**Multiple: SIEs from these 34 studies worked in multiple industries.		

Upon further analysis of the selected SIE qualitative articles, I found that 44% of them did not employ a guiding theory used for framing the study, while only 11% of them specified the use of grounded theory. Eight of the studies utilized one of the career theories (career capital theory, career construction theory, and contemporary career theory); whereas, seven of the studies utilized different social theories (social capital theory, social exchange theory, social identity theory, social learning theory, and social network theory). Several other theories were used in individual studies (i.e., conservation of resource theory, consumer decision-making theory, cultural theory, human capital theory, migration theory, PE-fit theory, psychological contract theory, self-categorization theory, systems theory, theory of vocational adjustment, and theory of work adjustment). The fact that nearly half of the selected qualitative SIE studies lack theoretical grounding (Table 3.14) reflects the lack of consensus among the SIE researchers

about which dominant theories should guide the research of SIEs, suggesting that the research of the SIE phenomenon is still in the nascent stage of its development.

Table 3.14 Theories Guiding Qualitative SIE Studies

Theories Guiding Qualitative SIE Studies		
None Found	27	44%
Career Theories*	8	13%
Social Theories**	7	11%
Grounded Theory	7	11%
Other***	12	20%
Total	61	
*Career Theories Include: Career Capital Theory, Career Construction Theory, and Contemporary Career Theory. **Social Theories Include: Social Capital Theory, Social Exchange Theory, Social Identity Theory, Social Learning Theory, and Social Network Theory ***Other Theories Include: Conservation of Resource Theory, Consumer Decision-making Theory, Cultural Theory, Human Capital Theory, Migration Theory, PE-Fit Theory, Psychological Contract Theory, Self-Categorization Theory, Systems Theory, Theory of Vocational Adjustment, and Theory of Work Adjustment.		

While most qualitative SIE studies lacked a guiding theory, they did cover a broad range of topics (Table 3.15). The most common topic addressed in the SIE studies was the careers of SIEs, as 30% of the articles focused on career development, career capital, and career success. The next most common topic, addressed in 18% of the articles, was SIE adjustment. While 16% of the articles focused on the topic of motivation for SIE relocation, the topics of identity or identity disclosure, SIE employment considerations, and expatriate types/typologies were addressed in 5% of the articles. Two articles were published on each of the following topics: psychological contract, relocation decision making, social networks, and transition; while one article was published on each of the following topics: attitude, connections, cross-cultural self-preparation, development, P-E fit, global talent management, justice, knowledge transfer,

mobility, onboarding, performance management, repatriation, work-life balance, and international relocation strategy.

Table 3.15 Topics of SIE Qualitative Studies

Topics of SIE Qualitative Studies		
Career*	17	30%
Adjustment/Adaptation	10	18%
Motivation for SIE	9	16%
Expatriate Types/Typologies	3	5%
Identity/Identity Disclosure	3	5%
SIE Employment Considerations	3	5%
Psychological Contract	2	4%
Relocation Decision Making	2	4%
Social Networks	2	4%
Transition	2	4%
Other**	14	25%
*Career: includes topics related to Careers, Career Development, and Career Capital.		
**Other: includes topics that have been studied in one article: Attitude, Connections, Cross-cultural Self-preparation, Development, P-E Fit, Global Talent Management, Justice, Knowledge Transfer, Mobility, Onboarding, Performance Management, Repatriation, Work-Life Balance, and International Relocation Strategy.		

Review of Qualitative Studies Examining SIE Concepts of Managerial Importance

In the following sections, I narrow my review to include only the qualitative SIE studies that include concepts of managerial importance for SIE retention, specifically those found as significant in the quantitative stage of this study - SIE adjustment, embeddedness, and retention. The main reason why I focus the review and synthesis of these SIE studies is to inform my design of the qualitative stage of my study, which is reported in the concluding part of this Essay

Three. As shown in Table 3.16, the vast majority of these studies (82%) have focused solely on the individual level addressing either interpersonal or intrapersonal concepts. Three studies (5%) have focused on the perceptions of managers, while seven studies (13%) have examined relationships across levels, one of which by Makkonen (2017) included the concepts from the organizational environment. In these studies, researchers interviewed participants from multiple organizations, while in only three studies, researchers interviewed participants employed in a single multinational corporation.

Table 3.16 SIE Qualitative Studies Phenomenon Levels

SIE Qualitative Studies Phenomenon Levels		
Micro	46	82%
Meso	3	5%
Multilevel	7	13%
Total	56	

My review of the qualitative SIE studies that focused on concepts of managerial importance yielded five main themes that I identified as common across these studies (Figure 3.2). The first theme is the *organization's perceptions of SIE employability*, which is addressed in three studies. The authors of the first study, who interviewed HR professionals in India, uncovered four organizationally-relevant factors that contributed to perceptions of SIE employability (Kumar & Chhokar, 2019). The four factors included the expansion pursuing new business opportunities, rapid growth, global ambition, and organizational maturity (Kumar & Chhokar, 2019). The second study, conducted by Makkonen (2017), uncovered additional organizationally relevant factors related to perceptions of SIE employability, such as strategic aim for localization, attrition rate of local employees, the need for contemporary experiences and

methods, as well as moral/ethical business decision considerations. In the third study, the authors examined person-environment fit as an organizationally relevant factor that contributes to the perception of SIE employability (Makkonen, 2015). These three studies have identified nine organizational factors related to organization's perceptions of SIE employability. In addition to the nine organizational factors, Makkonen's (2017) multi-level study included four contextual factors and three individual factors that organizations should take into account because they influence their perceptions of SIE employability. The four contextual factors are increased importance of local market area, cultural and language factors, the balance of supply and demand of local talent, and the degree of appreciation of Western education and qualifications (Makkonen, 2017). The three individual level factors include human and social capital, career identity, and personal adaptability.

The second common theme shared among the qualitative SIE studies that were focused on phenomenon of managerial importance was the relationship between SIE employment and the subsequent *organizationally perceived outcomes and onboarding activities*. After interviewing 24 SIE human resource managers, recruitment consultants, and managers in China, Makkonen (2017) identified both positive and negative outcomes of organizational importance related to the employment of SIEs. The positive outcomes included increased organizational effectiveness and performance, compliance with moral and ethical standards, and a mutually beneficial relationship. Additionally, Arp (2013) found that organizational growth was a positive outcome of SIE employment. The negative outcomes of SIE employment reported in the studies were the inability to contribute to organizational performance, issues with work efficiency, high levels of attrition, organizational friction and imbalance, and financial risks and wasted resources (Makkonen, 2017). Also, Guomundsdottir and Lundbergdottir (2016), who interviewed seven

directors, managers, counsellors, and consultants in a Nordic corporation to study the onboarding process and experience of SIE employees, found three positive factors related to onboarding - the provision of a mentor, incorporation of the spouse into the onboarding process, and the integration of non-work-related knowledge sharing (Guomundsdottir & Lundbergdottir, 2016).

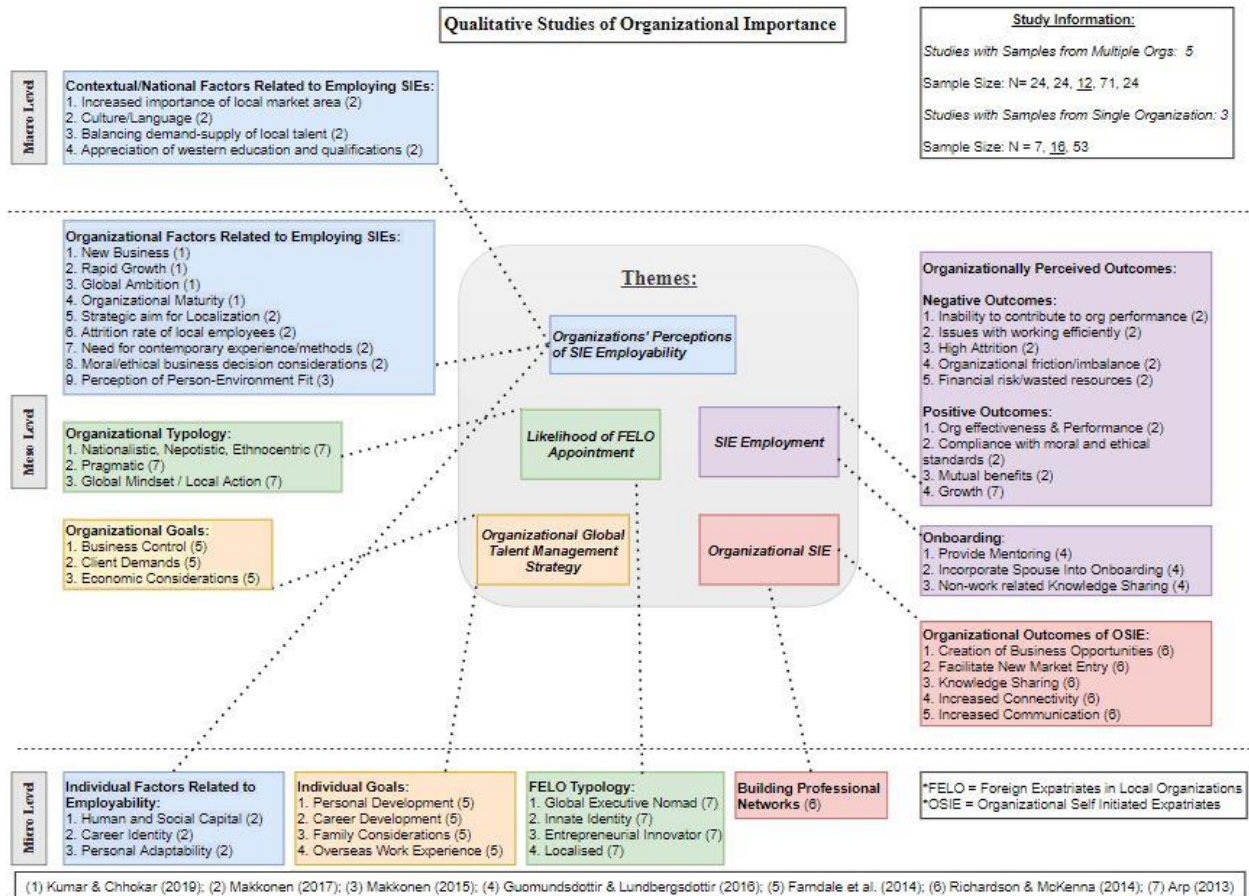
The third theme encompassed the *organizational global talent management strategies* that are pursued by organizations that employ SIEs. Specifically, Farndale, Pai, Sparrow, and Scullion (2014) interviewed 16 general managers and human resource specialists to assess the goals that influence strategies among multinational corporations. These assessed organizational level goals were business control, client demands, and economic considerations; and individual level goals include personal development, career development, family considerations, and overseas work experience. The authors suggested that multinational organizations should balance the organizational and individual SIE goals in order to implement global talent management practices that are mutually beneficial (Farndale, Pai, Sparrow, and Scullion, 2014).

In the fourth theme, Richardson and McKenna (2014) introduced a special case of an SIE that they labeled as the *Organizational SIE*. The Organizational SIE refers to individual SIEs that self-initiate transfer from one country to another country while staying employed within the same multinational organization. While the traditional SIEs have been defined as those who join a new organization, the Organizational SIEs are defined as those who remain in the same multinational organization throughout the transitions in their employment. The authors found that Organizational SIEs relied on their professional networks which allowed them to move internationally within the same organization. The employment of Organizational SIEs benefits the organization by creating business opportunities, facilitating new market entry, engaging in

knowledge sharing, increasing connectivity, and increasing communication throughout the organization (Richardson & McKenna, 2014).

The final, fifth theme referred to the *likelihood of a FELO appointment* in a multinational corporation. Arp (2013) examined the likelihood of the appointment of a foreign executive in a local organization (FELO) by interviewing 46 foreign executives and 25 local peers located in Malaysia. The author identified the following orientations in the organizational typology: pragmatic-oriented organizations, global/local action-oriented organizations, and nationalistic/nepotistic/ethnocentric-oriented organizations. The orientations identified in the FELO typology included the global executive nomad, innate identity, entrepreneurial innovator, and localized. The authors proposed that the likelihood of a FELO appointment is dependent on the match between the individual level FELO type and the organizational level typological orientation (Arp, 2013). In sum, the seven SIE qualitative articles, in which the organizational factors were considered, produced five themes (see Figure 3.2). In the next section, I will further narrow my focus by reviewing past qualitative SIE studies that have examined the key constructs of this study - adjustment, embeddedness, and retention.

Figure 3.2 Thematic Synthesis of Qualitative SIE Studies Focused on Phenomenon of Managerial Importance



Review of Adjustment, Embeddedness, and Retention in Qualitative SIE Research

In the following sections I will review and synthesize the qualitative SIE research studies that involved the key constructs of my study - adjustment, embeddedness, and retention. My systematic review revealed thirteen studies involving adjustment, four studies involving embeddedness, and one study involving retention.

Qualitative Studies Addressing Adjustment

SIE researchers have conducted thirteen qualitative studies involving adjustment at the individual level. These studies involved the micro, meso, and macro antecedents, as well as mediators and moderators. In addition to the three common adjustment types (general, work, and interaction) put forward by Black, Mendenhall, and Oddou (1991), four other adjustment types were addressed (adjustment in attitude, emotional adjustment, cultural adjustment, and pressure

for subjective adjustment). In the subsequent paragraphs, I will review these thirteen studies and synthesize their findings.

General adjustment was the most commonly used adjustment type as it was included in nine out of the thirteen studies. Individual level factors related to general adjustment included loneliness (Beitin, 2012), language ability (Betin, 2012; van Bakel & Salzbrenner, 2019; Harry, Dodd, & Chinyamurindi, 2019; Farcas, 2019; Richardson & Ng, 2019), relationship building (Betin, 2012; Farcas, 2019), use of personal networks (Araujo, Teixeira, Cruz, & Malini, 2014), freedom of choice (Schreuders-van den Bergh & Plessis, 2016; Farcas, 2019), self-efficacy (Agha-Alikhani, 2017), social reinforcement/interactions (Schreuders-van den Bergh & Plessis, 2016; Agha-Alikhani, 2017; Farcas, 2019), tenure (Agha-Alikhani, 2017), cultural experiences (Alpalsan Danisman, 2017; Harry, Dodd, & Chinyamurindi, 2019; Farcas, 2019; Richardson & Ng, 2019), identifying cultural similarities (Alpalsan Danisman, 2017), satisfaction with accommodations (Farcas, 2019), ancestral ties to host country (Richardson & Ng, 2019), realistic expectations (Farcas, 2019), previous international experience (Farcas, 2019), and personality (Farcas, 2019). Two studies reported that attitude toward host culture (Alpalsan Danisman, 2017) and upward learning spirals (Schreuders-van den Bergh & Plessis, 2016) mediate between the individual level factors and general adjustment. Additionally, Langinier and Froehlicher (2018) found that the relationship between social engagement and general adjustment at the individual level is moderated by macro level factors such as proportion of internationals, importance of national/international communities, need to speak the language, and the international corporate cultures.

In addition to individual level factors reported to influence general adjustment, organizational and contextual level factors were also reported as significant. At the

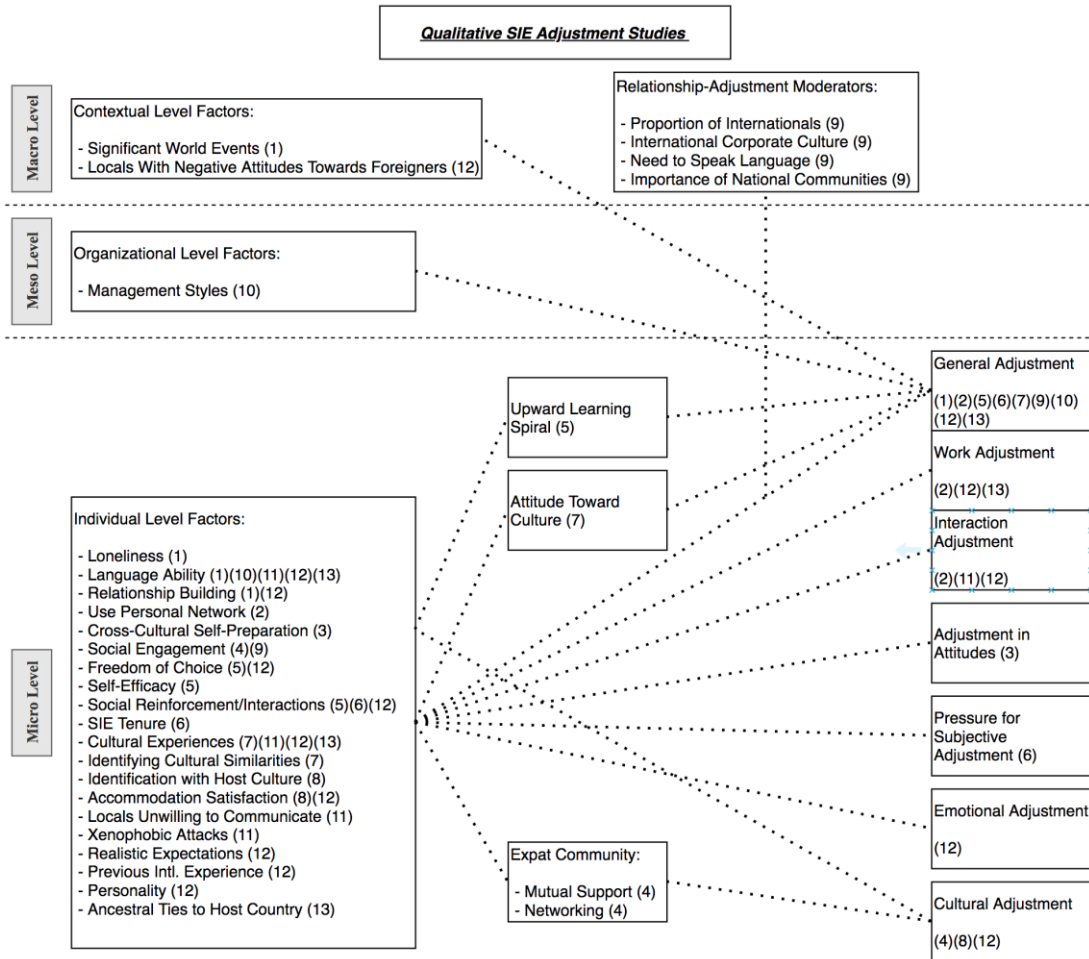
organizational level, the management style utilized by the host country organization influenced the SIEs general adjustment (van Bakel & Salzbrenner, 2019). At the contextual level, Beitin (2012) reported that significant events of global scope, such as the World Trade Center attacks on September 11th, impacted the general adjustment of some SIEs. Furthermore, host country nationals with negative attitudes towards foreigners also impacted the general adjustment of SIEs (Farcas, 2019).

Researchers reported several individual level factors related to work adjustment. These factors included use of personal networks (Araujo, Teixeira, Cruz, & Malini, 2014), language ability (Farcas, 2019; Richardson & Ng, 2019), relationship building (Farcas, 2012), autonomy (Farcas, 2012), social interactions (Farcas, 2012), cultural experiences (Farcas, 2012; Richardson & Ng, 2019), realistic expectations (Farcas, 2012), previous international experiences (Farcas, 2012), and ancestral ties to host country (Richardson & Ng, 2019). Interaction adjustment was impacted by the same factors with the exception of the ancestral ties. However, interaction adjustment was also influenced by xenophobic attacks and cases when host country nationals were unwilling to communicate with expatriates (Harry, Dodd, & Chinyamurindi, 2019). After outlining the above individual, organizational, and contextual factors related to general, work, and interactional adjustment, in the following paragraphs, I will present the findings related to the different types of adjustment reported in the literature.

Despotovic, Hutchings, and McPhail (2015) found that SIEs who engage in cross-cultural self-preparation report to experience greater adjustment in attitudes towards their context in their new location. Agha-Alikhani (2018) reported that SIEs with longer tenure felt higher levels of pressure for subjective adjustment. Farcas (2019) posited that individual level factors such as language ability, relationship building, autonomy, social interactions, satisfaction with

accommodations, realistic expectations, previous international experience, and personality influence emotional adjustment. The final type of adjustment, cultural adjustment, is reported to be influenced by social engagement (Clark & Altman, 2016), identification with host culture (Farcas & Goncalves, 2017), satisfaction with accommodations (Farcas & Goncalves, 2017; Richardson & Ng, 2019), and previous international experience (Richardson & Ng, 2019). Furthermore, cultural adjustment can be mediated by mutual support and networking within the expat community (Clark & Altman, 2016). Figure 3.3 below depicts synthesized findings related to the adjustment of SIEs.

Figure 3.3 Qualitative Studies Related to SIE Adjustment



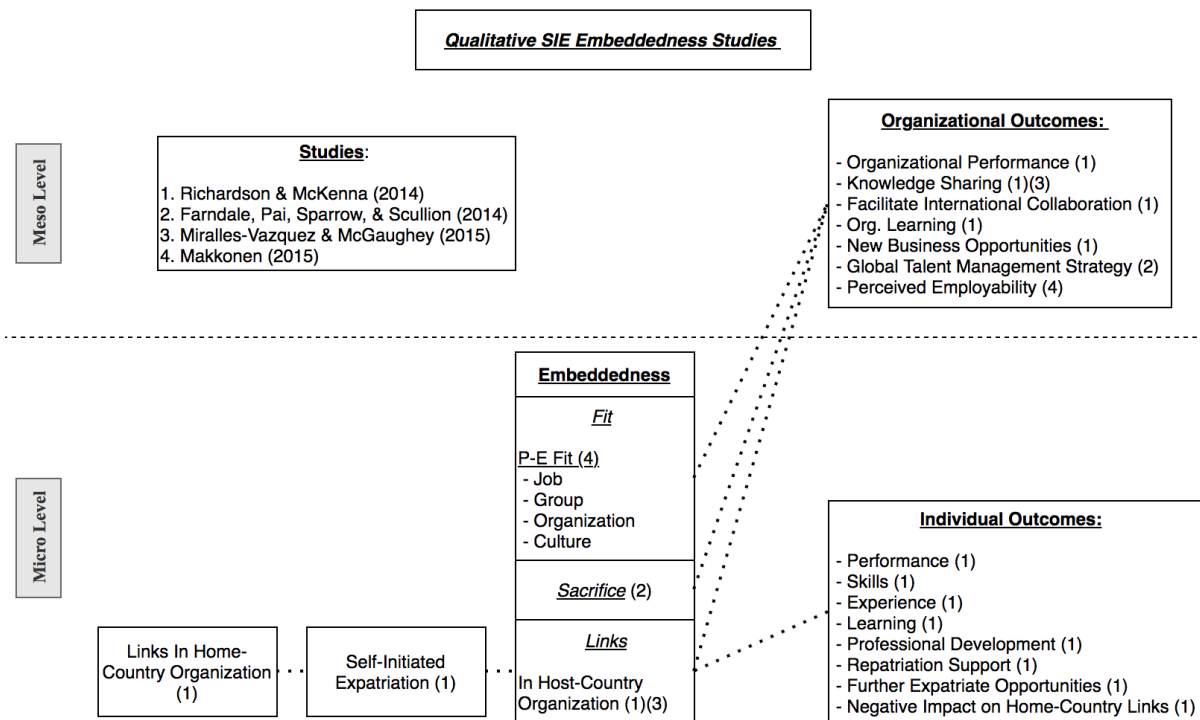
Qualitative Studies Related to Embeddedness

Four qualitative SIE research studies included elements of fit, sacrifice, or links, which are the three dimensions of embeddedness (Richardson & Mckenna, 2014; Farndale, Pai, Sparrow, & Scullion, 2014; Miralles-Vazquez & McGaughey, 2015; Makkonen, 2015). Richardson and McKenna (2014) found that organizational SIEs utilized their links in their home-country organization to help facilitate their expatriation. Once these SIEs arrive in their host country they begin establishing new links that help them to become embedded in their new context. The individual level outcomes associated with the accumulation of host-country organizational links included increased performance, skills, experience, learning, professional

development opportunities, repatriation support, further expatriate opportunities and a negative impact on home-country links (Richardson & McKenna, 2014).

Organizational level outcomes associated with embeddedness due to links included increased organizational performance, organizational learning, new business opportunities, knowledge sharing, and the facilitation of international collaboration (Richardson & McKenna, 2014; Miralles-Varquez & McGaughey, 2015). Farndale, Pai, Sparrow, and Scullion (2014) posited that an organizational outcome due to the sacrifice dimension of embeddedness included influence on global talent management strategies. Makkonen (2015) found that the fit dimension of embeddedness at the job, group, organization, and cultural levels impacted how organizations perceive the employability of SIEs. Figure 3.4 below pictorially depicts the findings of qualitative studies related to embeddedness of SIEs.

Figure 3.4 Qualitative Studies Related to SIE Embeddedness



Qualitative Studies Related to Retention

The retention of SIEs was comprehensively addressed by Arp (2013) in the article “Typologies: What types of foreign executives are appointed by local organizations and what types of organisations appoint them?” In this study, the author interviewed 46 foreign executives and 25 host country nationals from Malaysia. This data analysis yielded two typologies. The first typology included three types of local organizations, namely: nationalistic, pragmatic, and global mindset. The second typology included four types of foreign expatriates in local organizations (FELOs) including global executive nomads, innate identity FELOs, entrepreneurial innovator FELOs, and localized FELOs. In regard to tenure, the author found that the FELOs tenure in the local organization was largely dependent on the type of FELO category in which they fall.

The shortest tenure is reported for *global executive* FELOs because they are “appointed for specific expertise and hard skills, with a view to be replaced by local successors” (Arp, 2013, p. 178). The second type of FELOs, the *innate identity* FELOs, are expected to complete a medium-length tenure in the local organization, as they are appointed based on their appropriate characteristics. The third type of FELOs, *entrepreneurial innovator* FELOs, are also expected to complete a medium-length tenure with the local organization, as they have the “ability to translate a foreign concept into genuine innovation in the host-country context” and discover new business opportunities (Arp, 2013, p. 180). The final type of FELOs, the *localized* FELOs, are expected to complete a very long tenure in the local organization because they have developed a “third-cultureness” which is “a unique supranational stance on socio-economic issues combined with deep understanding of, and emotional involvement with, their host-country environment” (Arp, 2013, 181). Arp’s (2013) study is the only SIE qualitative study that examines SIE tenure in multinational organizations. This study along with the previously

outlined studies associated with embeddedness, adjustment, and managerially relevant studies provide a backdrop to the literature that my study in Essay Three will contribute to.

Qualitative Stage of My Study

The second, qualitative stage of my explanatory sequential mixed-methods study was designed based on the insights that I derived from the first stage, that involved the quantitative analysis of the archival data and from the systematic review of the qualitative SIE studies. These insights indicated that I should focus this qualitative stage on the goal to explain the managerial perceptions of the relationships between embeddedness, adjustment, and retention of SIEs in a multinational organization. Therefore, the research questions that guided the qualitative stage of this study were:

1: How does the professional tenure of SIEs impact retention at the subsidiary/unit level in multinational organizations?

2: How does adjustment affect the embeddedness and retention of SIEs?

3: What policies/systems can multinational organizations put in place to increase the retention of SIEs by way of embeddedness and adjustment promotion?

Qualitative Data Sources

To address the research questions guiding the qualitative stage of my study, I developed an interview protocol and formulated questions aimed at uncovering the perceptions of subsidiary unit managers on the relationships between SIE embeddedness and adjustment and retention (see Appendix G for full interview protocol). I coded the transcripts from the interviews based on these questions and analytic memos that I recorded (Esterberg, 2002; Yin, 2003; Goumundsdottir & Lundbergsdottir, 2016). See Table 3.17 for description of the interview data (pseudonyms have been assigned to each interviewee and title distinctions have been preserved).

Table 3.17 Description of Interview Data

Name	Interview Duration (Minutes)	Word Count	Pages of Analytic Memos
Elisha	65	8317	7
Abigail	77	9044	11
Judah	110	13811	22
Tedrick	77	10653	15
Michelle	72	9284	12
Paulos	76	12695	14
Kevin	68	8088	13
Dr. Diab	88	11113	16
Burch	59	8065	13
Dr. Jeter	68	8777	15
Average	76	9984.7	13.8
Total	760	99847	138

I utilized purposive sampling when interviewing my sample ($n = 10$) of subsidiary unit directors who worked in the single multinational organization. Eight of the interviewees were male, while the ages of all directors ranged from 42 to 67. While all interviewed managers held the highest country-level position (Director) at the time of their interview, several of them had previously held other managerial positions such as lead teacher, principal, and global vice president anywhere from 6 to 24 years. Their average number of years managing SIEs was 11.7 years, their average organizational tenure was 12.5, and their average expatriate tenure was 15.6 years. The interviewees lived in up to four countries throughout their SIE tenure and the most common country in which five of the interviewees lived was South Korea. The characteristics of each interview participant is detailed in Table 3.18.

Table 3.18 Characteristics of Interview Participants

Name	Sex	Age	Location	Leadership Positions Held	Years in SIE Management	MNO Tenure	Expat Tenure	Countries Lived In Outside US as SIE
Elisha	M	57	Peru	Director	8	10	10	Singapore, Peru, S.E. Asia
Abigail	F	42	Japan	Director, Lead Teacher	6	12	12	Japan
Judah	M	63	S. Korea	Director	24	29	29	S. Korea, Indonesia, Peru, Germany
Tedrick	M	40	Kenya	Director, Principal	6	9	9	Kenya
Michelle	F	56	S.E. Asia	Director, Principal	14	14	14	S.E. Asia
Paulos	M	56	Brazil	Global Vice President, Director, Principal	15	15	15.5	Indonesia, Brazil, Spain, Guatemala
Kevin	M	49	Turkey	Director	7	9	13	Turkey, S. Korea, Indonesia, Papua New Guinea
Dr. Diab	M	67	Kosovo	Director, Principal	7	7	7	Kosovo, S. Korea
Burch	M	44	Malaysia	Director	8	18	18	Malaysia, S. Korea
Dr. Jeter	M	59	Singapore	Director, Principal	22	2	28	S. Korea, Singapore
Average					11.7	12.5	15.55	2.4
Total					117	125	155.5	15

Qualitative Data Analysis

Following Miralles-Vazquez and McGaughey's (2015) suggestions for the sampling and analysis, I did not seek in this study either theoretical saturation (i.e., to continue the collection

and analysis of data to the point where no new themes or insights are uncovered) or data saturation (i.e., to continue interviewing until the data set is complete, with redundancy and replication indicating the saturation point). Instead, I framed the findings of Essay Three as suggestive rather than as conclusive. Moreover, in contrast to most previous SIE studies focused on individual level examination, this study focused on the organizational perspective, that is on the managerial perception of how things “might be” in opposition to declarations of how they are, thus creating opportunities for further conjecture, interpretation, and new lines of inquiry (Miralles-Vazquez & McGaughey, 2015). My addressing of the following research questions contributed to my identification of several themes revealed upon my analysis of the transcripts of the interviews with managers, analytical notes, and supporting organizational documents.

Qualitative Results of Addressing Research Question 1: “How does the professional tenure of SIEs impact retention at the subsidiary unit level in a multinational organization?”

Managers responding to the question how the professional tenure of SIEs impacted the retention of SIEs at the unit level explained that the occupationally embedded SIEs are retained through meeting the needs of the experienced SIEs. For example, Dr. Jeter stated that experienced SIEs, “Need incentives that can look like a lot of different things.” Similarly, Elisha said that, “More experienced teachers may be at a different stage of life and have different needs.” Abigail added, “Longevity is really based on whether they have the resources they need to be comfortable.” After analyzing the responses, I found that the respondents identified three categories of needs, which include family needs, professional needs, and psychological needs, that multinational organizations need to meet in order to retain SIEs (See Table 3.19).

Table 3.19 Needs of Occupationally Embedded SIEs

Category	Factor	Indicating Elements	Quote
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Family Needs	<i>Conditions</i>	Kids not adapting; Working spouse	Judah - "Their kids might not be adapting."; Paulos - "Their spouse is in a job in the community and they get to stay in a job and have fulfillment in their career."
	<i>Events</i>	Family issues; Getting married	Rader - "Other reasons have nothing to do with the school, they have family issues or they are looking to repatriate to the States or wherever they are from ... or they get married. Actually here, that has been a bigger issue here than anything because we have a lot of single female teachers and they get married."
	<i>Familial Environment</i>	Family atmosphere; Family community	Kevin - "A lot of experienced teachers have been here from the beginning and the foundational purpose and family atmosphere is a lot of why the long term teachers and administrators are still here."; Abigail - "People stay because we have a family community. People here do connect, when you ask the students, the caring community is what they say, and the teachers feel the same way."
	<i>Family Benefit</i>	Free tuition for children; Ease of transfer	Paulos - "Family benefit, if they have families, they like putting their kids through school with free tuition and they recognize the importance of that for their kids education. ... For some people that are more nomadic, that is a big draw to the network, to be able to see more than just one country or two."
	<i>Resources</i>	Financial resources; Housing	Elisha - "Typically, experienced teachers are at the stage of life where they need more financially. ... We have people who leave our organization because of limited resources."; Abigail - "I find, in Japan, if people have the resources they need, mainly money, you know housing and things like that, they are content."

	<i>Health</i>	Can't get health services; Health insurance	Abigail - "We have had some with health problems and they needed to go home to get services that they cant get here in Japan."; Paulos - "We have good health insurance, and that definitely helps out for people who are established."
Professional Needs	<i>Administrative Direction</i>	Leadership, Empowerment, Support, Accountability, Challenges, Freedom, Finances	Tedrick - "Leadership is a huge part for experienced teachers, knowing that they have the freedom but they also have the support. Support to try new things out, to take some risks and know that leadership has their back 100% and we support you in going down that road. I also think accountability for experienced teachers too. We all want to grow in our professions, so I do firmly believe that experienced teachers do want that attention as well."
	<i>Contribution</i>	Contribution	Dr. Diab - "If they do not have that kind of opportunity to use their experience and to use the things that they have learned and to put them into decision making and the policies and procedures of the school, then they feel left out and disenfranchised and that is the quickest way to lose experienced teachers if they do not feel involved in the school's growth and mission."
	<i>Feedback</i>	Constructive criticism, Follow-up, Mentorship, Observation	Tedrick - "I think what helps them stay too is knowing that leadership is pouring in financially, professional development funds, we are going to observe you, we are going to give you constructive criticism, we are going to help you grow, and not just leave you to do everything on your own. It's support, they want that support."
	<i>Growth & Development</i>	Learn new things, Professional development, Opportunities for growth	Dr. Diab - "They are also looking for personal professional growth, whether that is getting a masters or pursuing a doctorate, or just getting professional development that allows them to be updated with technology and with what is happening in the classroom, so

			professional development is important for them."
	<i>Professional Success</i>	Good test results	Judah - "They stay when they are fulfilled in their classroom, when there are good test results, when they are having success adapting to the culture, when they have been able to build community and have friends."
	<i>Relationships</i>	Collaborative relationship, Relationship with administration	Michelle - "They feel a sense of connectedness and value, and that they are able to give back to education, not only in the classroom, but in their interactions with inexperienced teachers. The value would be tied to administration recognizing them as fellow professionals and being willing to have a collaborative relationship."; Dr. Diab - "That connection between their principal or head of school, that relationship between administration and experienced teachers needs to be a positive one."
Psychological Needs	<i>Attachment</i>	Connectedness, Have friends, Social things, Build community	Abigail - "The human connection is the biggest thing for all people. Some people find it really hard here because if they are a social butterfly, your friendships can be limited because Japan is not one where the local community is going to make friends with you easily."
	<i>Orientation & Control</i>	Influence, Be invested, Best fit, Contributing, Flexibility, Importance, Invested, Involvement	Dr. Diab - "They need to see an opportunity for growth and involvement, they do not want to just come in and punch a clock and do the teacher thing. They want to be a part of the decision making process, they want to see the school grow, and they want to be invested in that. If they do not have that kind of opportunity to use their experience and to use the things that they have learned and to put them

			into decision making and the policies and procedures of the school, then ... that is the quickest way to lose experienced teachers."
	<i>Pleasure or Pain Avoidance</i>	Contentment, Really miss home, Positive workplace, Comfort	Abigail - "Turnover is really affected by people who really miss home. Longevity is really based on do they have the resources they need to be comfortable."
	<i>Self-esteem</i>	Appreciation, Encouragement, Feel respected, Valued, Fulfill passion, Meaningfulness, Purpose, Calling	Elisha - "I have seen and experienced people, people come to places that would be viewed as a sacrifice. Why do they do that, because a sense of calling and purpose. A person who feels like they are contributing to something in a meaningful way, and that they are a valued part of that team, they are more likely to stay on board and continue that commitment even if it means some sacrifice."

Family Needs

The interviewees pointed out that experienced SIEs expected that their multinational organization would meet their family needs so that they could continue working for the organization. There six factors related to family needs included *conditions, events, familial environment, family benefits, resources, and health*. The first factor was related to family member *conditions* such as the employment condition of the SIE’s spouse or the condition of the children’s adaptation to the new environment. Judah reported that SIEs leave because, “Their kids might not be adapting.” Paulos explained that, “Their spouse is in a job in the community and they get to stay in a job and have fulfillment in their career.” Evidently, the conditions of the SIE’s family members play a significant role in the SIE’s ability to remain employed in the multinational organization.

The second factor related to family needs is related to family *events*, such as marriage. Dr. Jeter explained, "Other reasons have nothing to do with the school, they have family issues or they are looking to repatriate to the States or wherever they are from ... or they get married. Actually here, that has been a bigger issue here than anything because we have a lot of single female teachers and they get married." The third factor is the need for a *familial environment* which is characterized by a family atmosphere and community. For example, Kevin reported, "A lot of experienced teachers have been here from the beginning and the foundational purpose and family atmosphere is a lot of why the long term teachers and administrators are still here." Abigail explained this sense of purpose, "People stay because we have a family community. People here do connect, when you ask the students, the caring community is what they say, and the teachers feel the same way."

The fourth factor is family *benefits* such as free tuition for children and the ease of transfer from one subunit in the multinational organization to another. Paulos stated that, "If they have families, they like putting their kids through school with free tuition and they recognize the importance of that for their kids' education." When addressing the desire for some families to move from one location to another, Paulos added, "For some people that are more nomadic, that is a big draw to the network, to be able to see more than just one country or two."

The fifth factor is *resources*, such as financial compensation and housing arrangements. Elisha stated, "Typically, experienced teachers are at the stage of life where they need more financially. ... We have people who leave our organization because of limited resources." In addition, Abigail added, "I find, in Japan, if people have the resources they need, mainly money, you know housing and things like that, they are content." The sixth factor is related to family needs, such as those associated with *health*. Having their health insurance needs covered by the

organization, as well as being able to receive treatments in the host country, are important factors influencing SIE retention. Abigail commented, "We have had some with health problems and they needed to go home to get services that they can't get here in Japan." Paulos added, "We have good health insurance, and that definitely helps out for people who are established." Overall, managers perceived that these six factors related to family needs should be met to retain SIEs.

Professional Needs

The second category of needs that multinational organizations are expected to provide for their experienced SIEs are professional needs. Managers outlined six factors related to professional needs that included *administrative direction, contribution, feedback, growth and development, professional success, and relationships*. The first factor is *administrative direction*, which included elements such as leadership, empowerment, support, accountability, challenges, freedom, and financial investment. Tedrick explained, "Leadership is a huge part for experienced teachers, knowing that they have the freedom but they also have the support. Support to try new things out, to take some risks and know that leadership has their back 100% and we support you in going down that road. I also think accountability for experienced teachers too. We all want to grow in our professions, so I do firmly believe that experienced teachers do want that attention as well."

The second factor related to professional needs is the SIE's desire to *contribute* to the organization. Dr. Diab reported, "If they do not have that kind of opportunity to use their experience and to use the things that they have learned and to put them into decision making and the policies and procedures of the school, then they feel left out and disenfranchised and that is the quickest way to lose experienced teachers if they do not feel involved in the school's growth and mission."

The third factor is *feedback* in the form of constructive criticism, follow-up, mentorship, and observation. Tedrick explained, "I think what helps them stay too is knowing that leadership is pouring in financially, professional development funds, we are going to observe you, we are going to give you constructive criticism, we are going to help you grow, and not just leave you to do everything on your own. It's support, they want that support." The fourth factor is the need for *growth and development*, which involves learning new things through opportunities for professional development. Dr. Diab stated, "They are also looking for personal professional growth, whether that is getting a masters or pursuing a doctorate, or just getting professional development that allows them to be updated with technology and with what is happening in the classroom, so professional development is important for them."

The fifth factor is *professional success*, which is manifested through good test results. Judah explained, "They stay when they are fulfilled in their classroom, when there are good test results, when they are having success adapting to the culture, when they have been able to build community and have friends." The sixth factor is the quality of *relationships* with colleagues and administrators. Michelle said, "They feel a sense of connectedness and value, and that they are able to give back to education, not only in the classroom, but in their interactions with inexperienced teachers. The value would be tied to administration recognizing them as fellow professionals and being willing to have a collaborative relationship." Dr. Diab echoed, "That connection between their principal or head of school, that relationship between administration and experienced teachers needs to be a positive one." Managers perceived that these six factors related to professional needs should be met in order for SIEs to be retained in the multinational organization.

Psychological Needs

The third category of needs, which managers perceive that their multinational organizations should provide for their experienced SIEs, involves psychological needs. In order to group the large number of psychological needs of experienced SIEs that were reported by the interviewees, I utilized Grawe's (2004) framework of basic needs which are grounded under four factors that include *attachment, orientation and control, pleasure or pain avoidance, and self-esteem*. Related to the first factor of *attachment* needs, the respondents indicated the importance of meeting the needs of connectedness, having friends, doing social things, and building community were important. Specifically, Abigail explained, "The human connection is the biggest thing for all people. Some people find it really hard here because if they are a social butterfly, your friendships can be limited because Japan is not one where the local community is going to make friends with you easily."

The second factor is *orientation and control* which is characterized by contributing, having flexibility, being invested, important, involved, and having influence. Dr. Diab explicated, "They need to see an opportunity for growth and involvement, they do not want to just come in and punch a clock and do the teacher thing." He added further, "They want to be a part of the decision making process, they want to see the school grow, and they want to be invested in that." Finally, he warned that, "If they do not have that kind of opportunity to use their experience and to use the things that they have learned and to put them into decision making and the policies and procedures of the school, then ... that is the quickest way to lose experienced teachers."

The third factor is *pleasure or pain avoidance* which was perceived by the interviewees to include contentment, really missing home, positive workplace, and comfort. Abigail mentioned that, "Turnover is really affected by people who really miss home. Longevity is really

based on do they have the resources they need to be comfortable." The fourth factor is *self-esteem* which can be influenced by appreciation, encouragement, feelings of respect, being valued, fulfilling passions, and a sense of meaningfulness, purpose, and calling. Elisha explained, "I have seen and experienced people, people come to places that would be viewed as a sacrifice. Why do they do that, because of a sense of calling and purpose. A person who feels like they are contributing to something in a meaningful way, and that they are a valued part of that team, they are more likely to stay on board and continue that commitment even if it means some sacrifice." Overall, managers perceive that their multinational organizations should ensure that the family, professional, and psychological needs of their experienced SIEs are met in order to retain them. In the next section, I address the second research question of the qualitative stage of this study. This question addresses how adjustment affects the embeddedness and retention of SIEs.

Research Question 2: "How does adjustment affect the embeddedness and retention of SIEs?"

When the SIE managers were asked how the adjustment of professional SIEs influences their embeddedness and retention, the interviewees answered the question with substantive detail. The majority of the respondents reported that *personal* adjustment factors primarily influenced embeddedness and retention, while 43% reported the primary influence of *relational* factors, and 29% reported the primacy of *contextual* factors. Tedrick expressed, "The adjustment process and period, I do believe is crucial" and Dr. Diab added, "If you can't make the adjustments, you are not going to be able to become embedded." In the following sections, I describe each of the personal, relational, and contextual factors related to adjustment in terms of how these factors either enhance or inhibit or act as boundary conditions for embeddedness and retention that were reported by the interviewees (See Table 3.20).

Table 3.20 Adjustment Factors Influencing SIE Embeddedness and Retention

	Factor	Description	Quote
Personal Encouraging /Enhancing Factors	<i>Abilities</i>	When SIEs are able to adjust, focus on job tasks, and use the host-country language, these abilities are encouragements to their embeddedness and retention.	Burch - "The ability to adjust, yes, the willingness to adjust absolutely will affect if they will be embedded or not."
	<i>Actions</i>	Respondents identified many personal actions that adjusted SIEs engage in that encourage embeddedness and retention such as "talk to people", "learn the language", "go outside", "jump in", and "start working."	Tedrick - "If you cannot adjust ... If you don't feel like you can go to people and talk to people through that adjustment period, and they are just having difficulty adjusting to the culture, the country, the school ... I don't think they would feel part of the team. As a result, they wouldn't be as embedded and they wouldn't be as likely to sign on for another contract."
	<i>Mentality</i>	SIEs who operate with a mentality characterized by flexibility, acceptance, and willingness to embrace the culture will be encouraged to become embedded and remain.	Dr. Diab - "If everyone else in the community has accepted a certain way of doing things and a certain set of values and embraced the culture, if you have not, I do not see how you can become embedded."
	<i>Speed</i>	Respondents also pointed out that experienced professional SIEs will become embedded more quickly due to their enhanced comfort in their professional role.	Rader - "It happens much quicker, because they adjust quicker, they are not all flumexed ... it just makes them move to the embedded stage must faster because, mainly, they are focusing on teaching and the adjustments that are happening at school."
Personal Inhibiting Factors	<i>Inability to Change</i>	SIEs that do not have the ability to adjust will be inhibited from being embedded and are not likely to be retained.	Dr. Diab - "If you can't make the adjustments, you are not going to be able to become embedded."

	<p><i>Rigid Mentality</i></p>	<p>SIEs that exercise a mentality that is resistant to change whereby their expectations are unpliant will be inhibited in their embeddedness.</p>	<p>Kevin - "Some things that are normally expected, do not exist in the new school." For example, "We had one teacher, when they came there was a grey area and it was an unexpected thing that he couldn't get over and he ended up not being able to stay."</p>
	<p><i>Psychological Reaction</i></p>	<p>Stress is another factor that inhibits embeddedness and retention of experienced professional SIEs.</p>	<p>Rader - "When you bring in a 20 year experienced teacher, the only thing they worry about for, for the most part, is how to live in Singapore, and they can make that adjustment fairly quickly. The other person has double the issues and double the stress in their lives."</p>
<p>Personal Boundary Condition</p>	<p><i>Previous Experience</i></p>	<p>SIE adjustment that stems from previous professional experience can be a boundary condition that affects embeddedness and retention.</p>	<p>Rader - "Experience with things like parent-teacher conferences and things that could be stressful, they are comfortable with all of that, so they become part of the community quickly. They also jump in there and start ... doing all of these things that make them an integral part of the community quickly."</p> <p>Tedrick - "I think experienced teachers adjust a bit quicker. Due to their wealth of knowledge. They have worked at maybe 1,2,3, maybe 4 other schools, and have gone through a similar transition already. The experienced teacher can weigh all of that out and compare it to what they are currently going through."</p> <p>Michelle - "If there is a large adjustment, it is more likely that the experienced teacher will not become embedded. They have the confidence to go and work somewhere else." For example they might think "I am too old for this, I have too much experience"</p>

			for this, I have done it this way and I am not willing to change now." - type of mentality."
Relational Boundary Conditions	<i>Relationship to Group</i>	The SIE's relationship to the group is a boundary condition that influences their embeddedness and their retention.	Tedrick - "Yes, because if you cannot adjust, then you feel on the outer edge and you don't feel a part ... and I don't think they would feel part of the team. As a result, they wouldn't be as embedded and they wouldn't be as likely to sign on for another contract or to be embedded.
	<i>Depth of Relationships</i>	In order to become embedded, SIEs must develop deep relationships with individuals in their communities.	Dr. Diab - "You will not be able to have the depth of relationship with your colleagues, students, or local community. Without that depth of relationship, the chance for embeddedness is simply not there. I do not see how you could do it."
Contextual Boundary Conditions	<i>External Expectations</i>	The SIE's surrounding community will impose external expectations upon the SIE which will influence their ability to become embedded.	Dr. Diab - "If everyone else in the community has accepted a certain way of doing things and a certain set of values and embraced the culture, if you have not, I do not see how you can become embedded. ... the chance for embeddedness is simply not there.
	<i>Organizational Intervention</i>	The multinational organization that employs the SIE will also play a role in the SIE's ability to remain employed in the organization.	Burch - "If they are not willing to adjust, we have had to make the choice for them not to be embedded. We have invited them to be successful elsewhere sometimes." Michelle - "Begrudging adjustment and being critical and complaining will lead to not staying around very long. Because it will spread around to other areas. ... the most healthy

			thing for them, for the school, and for the others that they negatively impact would be to not look at retaining them."
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Personal adjustment sub factors that enhance embeddedness and tenure

Four personal adjustment sub factors were reported by managers to enhance embeddedness and tenure among SIEs in multinational organizations. These factors included abilities, actions, mentality, and speed. Relative to the first sub factor - ability, respondents indicated that when SIEs are able to adjust, focus on job tasks, and use the host-country language, these abilities enhance their embeddedness and retention. For example, Burch said, "The ability to adjust, yes, the willingness to adjust absolutely will affect if they will be embedded or not." The second sub factor is actions. Respondents identified specific personal actions in which adjusted SIEs engage that encourage their embeddedness and retention. These actions include "talk to people", "learn the language", "go outside", "jump in", and "start working." Tedrick explained, "If you cannot adjust ... If you don't feel like you can go to people and talk to people through that adjustment period, and they are just having difficulty adjusting to the culture, the country, the school ... I don't think they would feel part of the team. As a result, they wouldn't be as embedded and they wouldn't be as likely to sign on for another contract." Similarly, Paulos asserted, "You have got to learn the language and learn the culture, you don't have to master it, but you have to go outside. Really work hard at the relationships. Really work hard at friendships with colleagues. Have to make some friends outside of school. Being flexible. Getting to know people."

The third personal adjustment sub factor that enhances embeddedness and tenure, which was identified in the managerial responses, is the SIEs' mentality. SIEs who operate with a

mentality characterized by flexibility, acceptance, and willingness to embrace the culture will become embedded and remain employed in the multinational organization. According to Dr. Diab, "If everyone else in the community has accepted a certain way of doing things and a certain set of values and embraced the culture, if you have not, I do not see how you can become embedded." The fourth sub factor is speed as respondents pointed out that experienced professional SIEs will become embedded more quickly due to their enhanced comfort in their professional role. For example, Dr. Jeter explained, "It happens much quicker, because they adjust quicker, they are not all flumexed ... it just makes them move to the embedded stage must faster because, mainly, they are focusing on teaching and the adjustments that are happening at school." When these four personal adjustment factors are manifested at high levels, they influence SIEs to become embedded and remain employed within the multinational organization.

Personal adjustment factors that inhibit embeddedness and tenure.

Respondents specified three sub factors related to personal adjustment that inhibited the embeddedness and retention of professional SIEs. These sub factors included the inability to change, rigid mentality, and psychological reactions. The first sub factor, inability to change, inhibits the embeddedness and tenure of SIEs because it prevents them from making necessary adjustments. As Dr. Diab explained, "If you can't make the adjustments, you are not going to be able to become embedded." The second factor, rigid mentality, refers to SIE thinking patterns that are characterized by resistance to change and unpliant expectations. According to Kevin, "Some things that are normally expected, do not exist in the new school," for example, "We had one teacher, when they came there was a grey area and it was an unexpected thing that he couldn't get over and he ended up not being able to stay." The third personal adjustment sub

factor that can inhibit embeddedness and turnover is the SIE's psychological reaction to stress. Dr. Jeter explained, "When you bring in a 20-year experienced teacher, the only thing he or she worries about, for the most part, is how to live in Singapore, and they can make that adjustment fairly quickly. The other person has double the issues and double the stress in their lives."

Personal, relational, and contextual factors as boundary conditions

The interviewed respondents described how *personal, relational, and contextual* factors acted as boundary conditions of SIE embeddedness and retention. Due to conflicting reports on the impact of previous experience on SIE embeddedness and retention, this *personal* factor was reported to act as a boundary condition. From the traditional managerial point of view, experienced teachers presumably have a greater knowledge base from which to pull, as their knowledge has been accumulated over time. Therefore, they will be able to utilize their knowledge and experience in decision making and focus more of their attention on engagement. For example, Dr. Jeter states, "Experience with things like parent-teacher conferences and things that could be stressful, they are comfortable with all of that, so they become part of the community quickly. They also jump in there and start ... doing all of these things that make them an integral part of the community quickly." Similarly, Tedrick said, "I think experienced teachers adjust a bit quicker. Due to their wealth of knowledge. They have worked at maybe 1,2,3, maybe 4 other schools, and have gone through a similar transition already. The experienced teacher can weigh all of that out and compare it to what they are currently going through."

The alternative managerial point of view assesses previous experience as a liability for embeddedness and retention because the ingrained undesirable behaviors might have developed through habituation. For example, Michelle states, "If there is a large adjustment, it is more

likely that the experienced teacher will not become embedded. They have the confidence to go and work somewhere else. For example, they might think ‘I am too old for this, I have too much experience for this, I have done it this way and I am not willing to change now’ - type of mentality." Therefore, previous experience is a factor that can act as a boundary condition for embeddedness and retention among SIEs.

The interviewed respondents indicated two *relational* boundary conditions that influence embeddedness and tenure among SIEs. The first relational boundary condition is the SIEs’ ingroup/outgroup relationship to their colleagues. As opposed to outgroup SIEs who are on the “outer edge”, ingroup SIEs who feel “a part” of the group and who are an “integral part” will be able to become embedded in the community. Tedrickl said, “Yes, because if you cannot adjust, then you feel on the outer edge and you don't feel a part ... and I don't think they would feel part of the team. As a result, they wouldn't be as embedded and they wouldn't be as likely to sign on for another contract or to be embedded.” The second relational boundary condition is the depth of relationships that SIEs have with others. Specifically, to become embedded, SIEs must develop deeper relationships with individuals in their communities. Dr. Diab said that SIEs who do not adjust “will not be able to have the depth of relationship with their colleagues, students, or local community. Without that depth of relationship, the chance for embeddedness is simply not there. I do not see how you could do it.”

The interviewed respondents indicated two *contextual* boundary conditions that influence SIE’s embeddedness and retention. The first contextual boundary condition is the expectations that are externally placed on the SIE by the local community. These external expectations must be met by the SIE in order to continue working in the organization. For example, one respondent stated, “If everyone else in the community has accepted a certain way of doing things and a

certain set of values and embraced the culture, if you have not, I do not see how you can become embedded. ... the chance for embeddedness is simply not there.” The second contextual boundary condition is organizational intervention. The multinational organization that employs the SIE will play a critical role in the SIE's ability to remain employed in the organization. Burch said, “If they are not willing to adjust, we have had to make the choice for them not to be embedded. We have invited them to be successful elsewhere sometimes.” Michelle similarly stated, “Begrudging adjustment and being critical and complaining will lead to not staying around very long. Because it will spread around to other areas. ... the most healthy thing for them, for the school, and for the others that they negatively impact would be to not look at retaining them.”

In sum, the adjustment of professional SIEs is important to their embeddedness and retention, as both personal enhancing factors and personal inhibiting factors play a role that is bounded by personal, relational, and contextual conditions. When considering the importance of professional SIE adjustment, Dr. Diab stated, “The experienced teacher's adjustment will significantly impact their retention at the school. I have seen several teachers who have struggled with the adjustment and their tenure was always short.”

Research Question 3 Results

What policies/systems can multinational organizations put in place to increase the retention of SIEs by way of embeddedness and adjustment promotion?

When asked what multinational organizations can do to improve SIE retention through promotion of embeddedness and adjustment, the interviewees provided a number of different avenues to address the needs and address adjustment factors mentioned above. Specifically, Abigail stated, “I have tried to meet teachers where they are at, and if we can accommodate their needs, we do what we can.” Whereas, Dr. Diab asserted, “Opportunities need to be created, they will not happen by themselves. Some things happen organically, but if you really want to build a

level of connectedness then there has to be intentional practices, policies, and activities where people can connect.”

I analyzed and synthesized the above interviewee responses to align them with the needs and adjustment factors (See Table 3.21). Additionally, I identified formal policies, less formal procedures, and informal practices, as well as specific organizational actions and goals, which a multinational organization can implement, in order to increase retention by promoting embeddedness and adjustment.

Table 3.21 Addressing SIE Need and Adjustment Factors Through Policies, Procedures, and Practices

Need and Adjustment Factors	Policy, Procedure, Practice	Organizational Action or Goal	Quote
Family Need - Conditions	Procedure	Provide Counseling	Elisha - "In light of everything that has happened this year, we are doing some grief counseling to offer support because people have lost family members."
Family Need - Events	Procedure	Plan Events	Judah - "Member care is an aspect that is there for that purpose. We celebrate birthdays, and look out for what is going on in people's lives. Celebrations and building community at this school is important to member care. Meet the needs of families, help families in their everyday life here."
Family Need - Familial Environment	Practice	Host Activities	Michelle - "We have groups of oasis only where it is like a family unit. We have a member care-type person who will host that group with an older couple, a married couple with children, and a few singles. They will go hiking or go out to dinner together, or things like that just to have like an extended family type unit."

Family Need - Family Benefit	Policy	Promote Program	Michelle - "From a financial and benefit perspective you get money towards retirement and that is tied to policy. The CARE fund. The more experienced teachers start thinking about whether they need to go back to establish social security, and things like that. Having benefits, after you have been here for so long, you could get an apartment by yourself. We have in place advanced degree programs where we will reimburse for programs. From a benefit perspective, we try to validate their need to advance their education and retirement."
Family Need - Health	Policy	Supply Insurance	Paulos - "As far as organizational support, we do have great insurance." ; Burch - "At the network level, I know they have the NICS Care plan. It is important, the basic things like insurance and things like that that help people stay without anxiety, but those two are going to be the main thing."
Family Need - Resources	Policy	Offer Attractive Salary & Benefit Package	Rader - "How do we create embeddedness, are there ways in which we can offer them to help them? ... There are steps in regards to salaries, the 3rd year bonus, and the airline ticket are incentives."
Professional Need - Administrative Direction	Practice	Present Vision & Mission	Dr. Diab - "I strongly believe in constantly promoting the vision and the mission of the school and the network every opportunity I get. Again, that is not a policy, but it is a procedure that I think every director has to follow. Every director should be constantly holding that vision up so that people are reminded of why they are there."
Professional Need - Contribution	Practice	Create Leadership Opportunities	Dr. Diab - "The biggest thing is to create opportunities to lead, whether it is department heads or heads of committees. Especially for experienced teachers, they need to know that you see them as experienced teachers and that they have things that they can contribute."

Professional Need - Feedback	Practice	Produce Feedback	Dr. Diab - "People have to know that they are needed and that they are an integral part of what is happening. Whether it is in a leadership role or in another role, there has to be a sense that they are needed here, not that they are irreplaceable, but that they feel that they are doing something that significantly contributes to the life of this place, that is the key."
Professional Need - Growth & Development	Practice	Challenge Towards Growth	Judah - "The school needs to reach out and help them with professional development." ; Tedrick - "Leadership opportunities. We want the experienced teachers to stay so we need to continue to cultivate and challenge them so there is not that stagnation. They are not stagnant in what they do. Form committees, take on new roles. That would be one thing that we encourage for our experienced teachers. Also, professional development opportunities ... Encourage leadership development, we want to challenge them, so they don't feel stuck or in a rut, and we want to provide them with professional development opportunities."
Professional Need - Professional Success	Practice	Acknowledge Success	Judah - "From the leadership end, if we are encouraging them, if they are a good teacher, they will be serving the students well, they will be connected with the students, they will be coaching, doing Bible studies with students, they will be leading the model UN or national honors society advisor, they will be doing many things outside of the classroom that connects them with students."
Professional Need - Relationships	Practice	Build Relationships	Judah - "They will feel a loss when they are leaving because the relationship with the students and fellow teachers that they have been developing. If they are mentoring a new teacher then there is going to be a sense of loss when they decide to leave and that mentorship relationship is going to be broken."

Psychological Need - Attachment	Practice	Recommend Connections	Michelle - "We have what we call encouraging partners that meet once a week, and that is 2-3 people. The encouragement can be about professional or personal life, and I think that helps."
Psychological Need - Orientation & Control	Policy	Advise Transfers	Judah - "The transfer policy helps, as teachers can seek to move between schools." ; Dr. Diab - "The ability people have to transfer from one school to another. Very often, it is not a bad thing to leave a school. You may be at one school for 6-7 years and that is your time and you need a change or the Lord is calling you somewhere else. You have the opportunity to do that, to me, that is one of the advantages of the network, you do have some options that are readily available to you. That goes a long way to keeping teachers within the network."
Psychological Need - Pleasure or Pain Avoidance	Procedures	Establish Positive Environment	Elisha - " The personal connections and the community is a benefit. When you continue to work with many of the same people and you continue to build relationships over time, that is positive."
Psychological Need - Self-esteem	Practice	Attend to Needs	Michelle - "Because people, when they are cared for and valued, they invest emotionally, spiritually, and professionally."
Personal Encouraging Factor - Actions	Practice	Recommend Social Outlets	Judah - "If they are active here and are focusing on ministry, they will have negative feelings when they leave and that transition will be more difficult when they leave than if they were just going through the motions like a job." "What you do for your single 20-30 year olds is the same, help them adjust to the culture and find a church. Help them with mentoring inside and outside the school."
Personal Encouraging Factor - Mentality	Policy	Assign Mentor	Abigail - "When we get a new teacher we give them a mentor. As director, I try to work with them as needed to help them find their comfort spot. The returning staff tries to help to assist. The formal system is the buddy system."

Personal Encouraging Factor - Speed	Procedure	Share Information	Tedrick - "We offer new teacher orientation right when teachers hit the ground and it shares all sorts of information about the country and the school, we really want to lay that out as quickly as possible and share that information to help them."
Personal Boundary Condition - Previous Experience	Practice	Provide Individualized Support	Judah - "If an experienced teacher is 40, they will be looking for different groups and it can be harder to connect them with others."
Relational Boundary Condition - Depth of Relationship	Practice	Develop Culture	Michelle - "Where they feel comfortable and they develop a deeper relationship with someone at all stages of life. I think that is helpful."
Relational Boundary Condition - Relationship to Group	Practice	Bring People Together Physically	Dr. Diab - "We have two wings to our building, the A wing and the B wing, physical separation very often determines the level of social relationship and interaction. We need those opportunities for community celebration, community activity in order to build those. REally, it is member care that does the majority of those types of things."
Contextual Boundary Condition - External Expectations	Practice	Highlight Incentive	Rader - "Singapore is amazing, that's probably our biggest incentive, to be honest, is where we are. I know, having taught in Korea, that Korea is not the place, it is not an incentive necessarily for a lot of people. But here, it absolutely is. They are willing to sacrifice a lot of things to stay here in Singapore."
Contextual Boundary Condition - Organizational Intervention	Policy	Change Organizational Structure	Dr. Diab - "For one thing, we did the academic team plus. That was a structural change, organizational change that we made in order to keep the teachers invested and to let them know that they are a necessary part and we need them."

The interviewed managers emphasized the importance of the organization’s system approach, internally referred to as “Member Care.” All of the interviewees highlighted the role

that this system played as it influenced adjustment, embeddedness, and retention of SIEs within the multinational organization (See Table 3.22).

Table 3.22 The Role of Member Care for Experienced SIE Adjustment, Embeddedness, and Retention

Interviewee	Quote
Michelle	"One thing that has helped with embeddedness is the Member Care component of our organization. I think Member Care is extremely important. Just as important as your academic principal, your policies for governance, and everything. I think that it is key and it is a major component, because people, when they are cared for and valued, they invest emotionally, spiritually, and professionally." "We have a member care-type person who will host that group with an older couple, a married couple with children, and a few singles. They will go hiking or go out to dinner together, or things like that just to have like an extended family type unit where they feel comfortable and they develop a deeper relationship with someone at all stages of life. I think that is helpful."
Dr. Diab	"The role that Member Care plays with getting people involved. Having activities where we do share community, that we are doing things together. Doing things together is not always a fun thing, sometimes it is serving one another. Especially during Covid, we do a lot of serving one another when it comes to: what can i do for you? You are in guarantee, how can I help? In one sense COVID breaks community, but in another sense it creates an opportunity to solidify community as well." "The role of Member Care. Opportunities need to be created, they will not happen by themselves. Some things happen organically, but if you really want to build a level of connectedness then there has to be intentional practices, policies, and activities where people can connect."
Tedrick	'Member Care also plays a role in helping our teachers, faculty, and staff. It is more of a support mechanism to help people get through challenging times. They do help people get plugged in, in a community sense. I think that is another piece about embeddedness, you find your community, you find your support groups, you are not a loner, an island, you are not all by yourself. Member care does a really good job of connecting people into a community group or a barnabas group so they can support and encourage one another.
Burch	"There are other things, Member Care, and the system that is set up around member care is good. Each context is a little different, in some places finances are more important, some places are hard to live, sometimes there are other factors that we need to take into consideration."

Elisha	"We have Member Care that seeks to do that embeddedness with everyone, like a special event. For example this weekend they did a women's gathering, or taking food to people, helping meet other kinds of needs." "Member care and mentoring are the kinds of regular things that we do, like prayer and devotions, we have a structure for that."
Judah	"Member Care does social care with many of our staff." "The more member care can do for the whole community, the better. Events, whether it is bowling, restaurants, volleyball games, or cultural shows, we want to get together and give those that want the opportunity to get together can do so." "Member Care does social care with many of our staff."

To gain a more comprehensive and deeper understanding of the Member Care system implemented in this multinational organization, I contacted and interviewed the Member Care Coordinator located at the headquarters of the multinational organization. The Member Care Coordinator explained to me that the vision of the Member Care system is to “To promote, encourage, advise, participate in, and help monitor the practical and pastoral care aspect of <organizational> staff members with the goal of helping them serve effectively and unhindered spiritually, socially, emotionally, and physically.” Additionally, the coordinator sent me the part of the Administrator Manual that outlines the policies, procedures, and practices carried out by individuals participating in the Member Care system. My review of the document corroborated the claims made by the interviewees. In the following sections, I summarize the findings of my sequential mixed-method study derived from addressing the four guiding research questions of Essay Three, and propose a model of managerial perspective on SIE retention.

Summary of the Findings of this Study

The intense competitive global landscape in the 21st century forces multinational organizations to increasingly draw from the limited talent pool of SIEs with the aim to meet their human capital needs. A major related challenge that multinational organizations face is SIE retention. In my systematic review of qualitative SIE studies, I identified the five themes

(employment, organizational SIE, talent management strategies, FELLO appointment, and perceptions of SIE employability) related to SIE retention. While previous researchers have reported the significant role of adjustment and embeddedness in retention of SIEs examined at the individual level (Ren et al., 2014; Hussain & Deery, 2018), I introduced the managerial perspective on the factors of organizational relevance that influence retention of SIEs in multinational organizations. Specifically, using the sequential explanatory mixed-method study, I have identified concrete policies, procedures, and practices that managers in multinational organizations can incorporate in order to retain SIEs by addressing the needs critical for their adjustment and embeddedness. Moreover, I have outlined specific activities that managers of multinational organizations should undertake to address these needs of their valuable SIE employees.

Model Proposal in Essay 3

The findings of both the quantitative and the qualitative stages of my mixed-methods design indicate that managers view as highly relevant the components of SIE embeddedness for the SIE retention. Specifically, in the quantitative stage, I found that the relationship between SIE occupational embeddedness and their organizational embeddedness was significant over several years. This finding was confirmed in the qualitative stage by the managers' view that SIEs who are tenured and embedded in their occupation (i.e., educational professionals) are more likely to be embedded in the organization and retained by the organization.

This is clearly illustrated by the following statement of a manager who addressed the ability of occupationally embedded SIEs to become organizationally embedded,

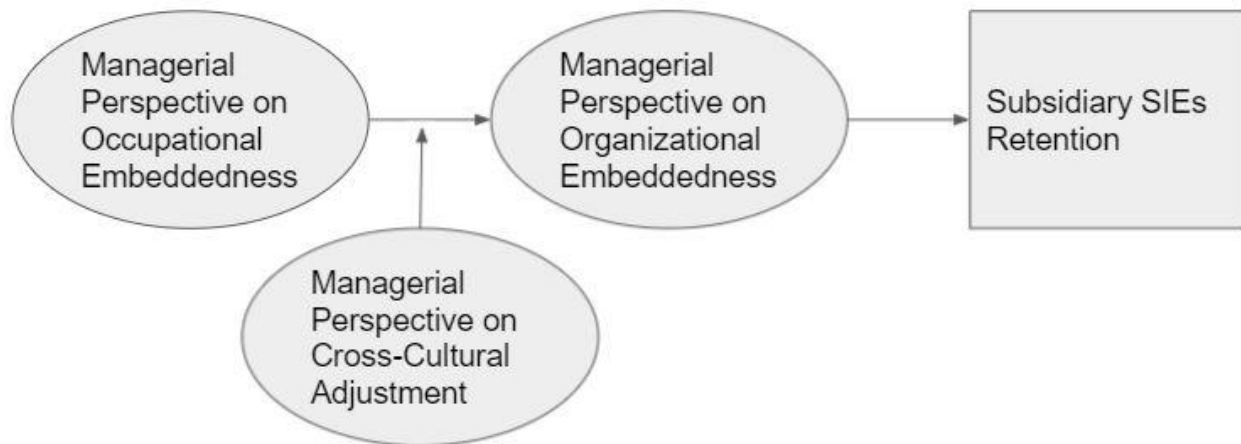
It happens much quicker ... it just makes them move to the (organizationally) embedded stage must faster because, mainly, they are focusing on teaching and the adjustments that are happening at school ... Experience with things like parent-teacher conferences and things that could

be stressful, they are comfortable with all of that, so they become part of the community quickly. They also jump in there and start doing all of these things that make them an integral part of the community quickly.

I also found that the relationship between occupational embeddedness and organizational embeddedness is conditioned by the SIEs' ability to adjust in the new culture (i.e., cross-cultural adjustment). In other words, those SIEs that are more capable of adjusting in the new cultural environment are more likely to be organizationally embedded and retained. This is plainly depicted by the following comment of a manager, "If there is a large adjustment, it is more likely that the experienced teacher will not become embedded." Another manager explained that if the SIE "cannot adjust, then they feel on the outer edge and they don't feel a part ... and I don't think they would feel part of the team. As a result, they wouldn't be as embedded and they wouldn't be as likely to sign on for another contract or to be embedded." When asked about the role of adjustment, Dr. Diab responded, "If you can't make the adjustments, you are not going to be able to become embedded." Similarly, Burch reported that, "If they are not willing to adjust, we have had to make the choice for them not to be embedded. We have invited them to be successful elsewhere sometimes."

Inducing from these insights, I propose the following model (Figure 3.5) of the managerial perspective on the SIE retention in subsidiaries.

Figure 3.5 Managerial Perspective on Subsidiary SIE Retention Model



Limitations of this Study

There are several limitations that are inherently present in the type of research conducted in this study. The first limitation is a small sample size ($n=11$), which is the number of subsidiary units (i.e. schools) that were included in the REML analysis. Additionally, several schools were not included in the analysis because they had not been in operation for all four of the years under review. Due to these two limiting factors, a small sample size and that schools that were not operating in the years under review were not included in the analysis, it is possible that the results of this study could be biased because only surviving schools were used, thus limiting the study's generalizability.

Another limitation is related to the implementation of the quantitative REML method. Due to the small sample size and unequal observations across units, maximum likelihood estimates were not used to compare across models. This limitation is due to the fact that REML takes away the fixed effects from the estimates and uses the restricted likelihood function (Raudenbush & Bryk, 2002). In other words, in order to obtain meaningful restricted likelihood estimates, comparative fixed effects have to be identical before evaluating the fit of different models (McNeish, 2017). In order to address this limitation in future studies larger samples

should be obtained for each second level predictor so that the maximum likelihood estimates, which include variance components and fixed effects, can be compared before the final model is estimated by way of REML. This would allow the researcher to mitigate the bias in variance component estimates and the increases in the Type-I errors (McNeish, 2017).

Furthermore, the archival data collated from the AMR surveys consisted primarily of self-reports. Also, the demographics of the respondents that were collected were not sufficient to conclude whether or not the sample was representative of the population. These are common weaknesses of survey research (Creswell, 2015). Another limitation is in the untested validity and reliability of the questions in the Annual Reviews (AR), as well as their espoused relationships to the constructs that they represent. The questions contained in the AR were developed over time by practitioners who valued the information that they gained from individuals who completed the questionnaire. While these questions are meaningful in a managerial sense, they were not formally validated. Although these questions lack formal validity, they can be used as proxies for concepts that could guide the qualitative stage of my study.

In addition to the limitations related to the quantitative stage of the study, there are also limitations related to the qualitative stage of the study. One limitation, which is common to all qualitative studies, is the inherent subjectivity related to the process of data collection and analysis (Stake, 2010). For instance, interviews that are conducted either face to face or through a technological medium suffer from the disadvantage brought on by the interviewer effect on the responses of the interviewees (Tashakkori & Teddlie, 1998). Another limitation of this study is the reduced ability of the researcher to establish rapport with those being interviewed due to the missing social cues present in the interviews conducted face to face (Roller & Lavrakas, 2015).

Additionally, my use of purposeful sampling, which was employed to select participants in the qualitative stage of the study, did not guarantee that the subjective judgements that were expressed by the individuals in the small sample size were representative of the entire population (Hayes, 2020).

Conclusion

Using a sequential mixed-methods design, I introduced a new managerial perspective on SIEs and identified the means to influence their embeddedness, adjustment, and retention in multinational organizations. This methodological approach is grounded in the pragmatic research philosophy which emphasizes a practical design with sequenced quantitative and qualitative stages (Daniel & Harland, 2017). For the quantitative stage of my design, I conducted statistical analysis of archival data related to SIEs of a multinational organization. For the qualitative stage, I analyzed the qualitative data that was collected from interviews of managers, analytic notes, and corroborating documentation. My research in the qualitative stage was guided by the insights derived from the quantitative stage (Stake, 2010) in combination with the insights derived from my systematic review of the qualitative SIE literature. The result of employing this explanatory sequential mixed-methods study, is a deeper understanding of the managerial perspective on SIE retention. Based on this understanding and the related findings, I proposed a new model of SIE retention at the subsidiary level.

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List of Appendices

Appendix A – Full List of Retained and Rejected SIE Review Articles

<i>Article</i>	<i>Use</i>	<i>Review Degree</i>	<i>Sample</i>	<i>Synopsis/Justification</i>
Richardson, J. (2006). Self-directed expatriation: family matters. <i>Personnel Review</i> .	No	Standard empirical	Purposeful sample of 30 SIE academics	Richardson (2006) investigates the role that family and significant others play in the decision to self-direct their expatriation.
Zikic, J., Bonache, J., & Cerdin, J. L. (2010). Crossing national boundaries: A typology of qualified immigrants' career orientations. <i>Journal of Organizational Behavior</i> , 31(5), 667-686.	No	Little/None	Purposeful, non-probability sampling strategy conducted by interviewing 45 qualified immigrants.	Authors identify six subjective themes related to objective barriers experienced by qualified immigrants and develop a typology of qualified immigrants' career orientations which include embracing, adaptive, and resisting.
Al Ariss, A., Koall, I., Ozbilgin, M., Suutari, V., Cao, L., Hirschi, A., & Deller, J. (2012). Self-initiated expatriates and their career success. <i>Journal of Management Development</i> .	Yes	Standard conceptual	Conceptual	Al Ariss, Koall, Ozbilgin, Suutari, Cao, Hirschi, and Deller (2012) provide a comprehensive review of the SIE literature and develop a substantial list of distinguishing characteristics that separate SIEs, AEs, and skilled migrants as well as produce a conceptual framework that can be used to explain SIEs' career success.
Shaffer, M. A., Kraimer, M. L., Chen, Y. P., & Bolino, M. C. (2012). Choices, challenges, and career consequences of global work experiences: A review and future agenda. <i>Journal of Management</i> , 38(4), 1282-1327.	Yes	Deep	114 Articles	In Shaffer, Kraimer, Chen, and Bolino's (2012) review of the choices, challenges, and career consequences of individuals possessing global work experience, the authors produced a classification that synthesized the literature related to corporate and self-initiated expatriates as well as global travelers such as short-term assignees, flexpatriates, and international business travelers. The classification reports the definition, purpose, duration, location, relocation, compensation, repatriation, international human resource management involvement,

				<p>advantages, and disadvantages of each type of global traveler. In addition to the classification, the authors posit a framework for relating global work experience to careers which incorporated career choices (e.g., external and internal influences), career challenges (e.g., personal, work, and nonwork demands), and career consequences (e.g., intrinsic and extrinsic career success). Moreover, the authors contribute a taxonomy of global work experiences which incorporates the high and low levels of physical mobility, cognitive flexibility, and non-work disruption.</p>
<p>Berry, D. P., & Bell, M. P. (2012). 'Expatriates': gender, race and class distinctions in international management. <i>Gender, Work & Organization</i>, 19(1), 10-28.</p>	Yes	Standard conceptual	Conceptual	<p>Berry and Bell (2012) point out the use of the terms "expatriate" and "migrant" in the international management literature, highlighting how the term "expatriate" is "normalized to produce and reproduce inequality and privilege across borders" (p.3). The authors develop a chart comparing studies that focus on expatriates versus the studies that focus on migrants and provide evidence across the dimensions of gender, race/ethnicity, employers and industries, sample of occupations and gender makeup, skill level, compensation and benefits, and organizational support.</p>
<p>Doherty, N. (2013). Understanding the self-initiated expatriate: A review and directions for future research. <i>International Journal of</i></p>	Yes	Deep	49 SIE articles	<p>Doherty (2013) reviewed 49 studies published on SIEs through 2011 and synthesized the findings of the studies based on a framework that takes into account their level of analysis</p>

Management Reviews, 15(4), 447-469.				(micro, meso, and macro). Clarification of the SIE construct was provided along with a comparison of company-backed expatriates and SIEs.
Doherty, N., Richardson, J., & Thorn, K. (2013). Self-initiated expatriation. Career Development International.	No	Little/None	5 articles in special review	Doherty, Richardson, and Thorn (2013) provide a short commentary outlining the development of the SIE field and introduce the papers included in the special issue.
Akram, A. A., & Crowley-Henry, M. (2013). Self-initiated expatriation and migration in the management literature. Career Development International, 18(1), 78-96.	Yes	Systematic	110 SIE Articles	Al Ariss and Crowley-Henry (2013) undertake a systematic review and analysis of the SIE literature and propose a definition for SIEs along with a comparison between SIEs and migrants along eight characteristics. Additionally, the authors provide a synthesis of 28 themes found in management literature about SIEs and migrants as well as a research map for further studies on SIEs.
Doherty, N., Richardson, J., & Thorn, K. (2013). Self-initiated expatriation and self-initiated expatriates. Career Development International.	Yes	Deep	Conceptual	Doherty, Richardson, and Thorn (2013) apply Suddaby's (2010) four elements of construct clarity to the SIE construct in order to provide clarity and a call for future research. Additionally, the authors produce a classification chart outlining seven forms of global mobility and how they are related to nine dimensions.
Tharenou, P. (2013). Self-initiated expatriates: an alternative to company-assigned expatriates?. Journal of Global Mobility.	Yes	Deep	21 Empirical Studies	In this conceptual paper, Tharenou (2013) reviewed 21 previous studies that compared SIEs to AEs and multinational corporation local employees in an attempt to explicate the taken for granted assumption that SIEs can be a suitable alternative for AEs. A

				framework for assessing self-initiated expatriates as an alternative to traditional expatriates was proposed as well as an assessment of the fit between career capital competencies (knowing-how, knowing-who, knowing-why) and employment types (SIE, AE, MNC local employee).
GOJER, A. E. J., & Allen, J. M. (2013). RUNNING HEAD: SELF INITIATED EXPATRIATES IN THE UNITED STATES: IMPLICATIONS FOR HRD. <i>Bilgi Ekonomisi ve Yönetimi Dergisi</i> , 8(1), 39-45.	No	Little/None	Conceptual	Joshua-Gojer and Allen (2013) provide an answer to the question "Is there a need to study self-initiated expatriates in the Unites States?" This short essay highlights the growing number of SIEs in the United States and suggests further study of the population. The manuscript does not offer a systematic review, theoretical contribution, or comparative analysis.
Arp, F., Hutchings, K., & Smith, W. A. (2013). Foreign executives in local organisations. <i>Journal of Global Mobility</i> .	Yes	Deep	71 Interviews	Arp, Hutchings, and Smith (2013) review the extant literature on expatriate assignments and SIEs and conduct an exploratory qualitative study that resulted in the proposal of a new category of foreign expatriate which is the foreign executive in logal organisations (FELOs).
Arp, F. (2013). Typologies: What types of foreign executives are appointed by local organisations and what types of organisations appoint them?. <i>German Journal of Human Resource Management</i> , 27(3), 167-194.	Yes	Deep	71 Interviews	Arp (2013) conducts a qualitative study in order to understand the types of foreign executives that are appointed by local organisations as well as the organisations appointing them. Two typologies/taxonomies are developed which outline four different types of FELOs and three different types of local organisations.

Andresen, M., Bergdolt, F., Margenfeld, J., & Dickmann, M. (2014). Addressing international mobility confusion—developing definitions and differentiations for self-initiated and assigned expatriates as well as migrants. <i>The International Journal of Human Resource Management</i> , 25(16), 2295-2318.	Yes	Systematic	136 articles	Andresen, Bergdolt, Margenfeld, and Dickmann (2014) conduct a systematic review of assigned/self-initiated expatriates as well as migrants. Additionally, the authors propose a typology of four different expatriate types as well as a decision tree that can be used to distinguish migrants from non-migrants. Furthermore, a Rubicon model of action phases is proposed which details the choose, pre-actional, act, and evaluate phases associated with expatriation.
Cerdin, J. L., & Selmer, J. (2014). Who is a self-initiated expatriate? Towards conceptual clarity of a common notion. <i>The International Journal of Human Resource Management</i> , 25(9), 1281-1301.	Yes	Deep	Extant SIE literature with definitions	Cerdin and Selmer (2014) review the SIE definitions found in the literature and subsequently propose a definition that aims to provide clarity in the field. Four conceptual criteria (self-initiated international relocation, regular employment, intentions of a temporary stay, and skilled/professional qualifications) are used to delineate SIEs from other expatriates and each of the criteria have been assigned.
Ryan, J., Silvanto, S., & Ozkaya, H. E. (2015). A contextual, theoretical and empirical analysis of the uses of university degrees as symbolic capital in self-initiated expatriation. <i>European Journal of International Management</i> , 9(5), 614-634.	No	Standard Empirical	150 Universities	In their study, Ryan, Silvanto, and Ozkaya (2015) explore "how, and to what extent, the internationalisation of universities and higher education is augmenting the symbolic capital that enables SIEs to venture abroad with the expectation that their skills and knowledge will be accepted and rewarded."
Przytuła, S. (2015). Migrants, assigned	Yes	Deep	Conceptual	Przytuła (2015) reviewed the literature on migrants, assigned

expatriates (AE) and self-initiated expatriates (SIE)- Differentiation of terms and literature-based research review. <i>Journal of Intercultural Management</i> , 7(2), 89-111.				expatriates, and self-initiated expatriates and synthesized the differentiating criteria between the groups which resulted in proposed definitions.
Tharenou, P. (2015). Researching expatriate types: the quest for rigorous methodological approaches. <i>Human Resource Management Journal</i> , 25(2), 149-165.	Yes	Deep	290 Published Manuscripts	Tharenou (2015) reviews 290 published manuscripts that examine international assignees, skilled immigrants, and self-initiated expatriates. The author compares the significant differences in research design of studies of expatriate types and proposes definitions for each type.
McKenna, S., & Richardson, J. (2016). Self-initiated expatriation: changing the ontological and methodological box. <i>Qualitative Research in Organizations and Management: An International Journal</i> .	No	Standard Conceptual	Conceptual	McKenna and Richardson (2016) propose a shift in the ontological and methodological approaches to studying self-initiated expatriates. The authors suggest that the predominant functionalist paradigm that dominates the field currently informs managers and organisations about the value of SIEs, however a shift towards actor-network theory would allow for the production of practical knowledge from the perspective of the SIE(s).
Vance, C. M., McNulty, Y., Paik, Y., & D'Mello, J. (2016). The expat-preneur: conceptualizing a growing international career phenomenon. <i>Journal of Global Mobility</i> .	Yes	Standard Conceptual	Conceptual	Vance, McNulty, Paik, and D'Mello (2016) review previous self-initiated expatriate literature and propose that the category of expat-preneur is an important and increasing international career category.
Farcas, D., & Gonçalves, M. (2016). Do three years make a difference? An updated review and analysis	Yes	Systematic	94 SIE articles	Farcas and Goncalves (2016) review extant literature on SIEs and provide an update to Doherty's (2013) review. The similarities and differences

of self-initiated expatriation. SpringerPlus, 5(1), 1326.				found in the literature between SIEs and AEs are described as well as a comparison of the of the micro, meso, and macro levels of research in the time period before this review and the time period that the review is conducted. The authors synthesized the 45 SIE articles that were published between 2012 and 2014 by providing the study focus, methodology, findings, and future suggestions.
Roth, S., & Dana, L. P. (2016). 'What is your self-made expat story?'Netnography of entrepreneurial re-users of a popular semantic. International Journal of Entrepreneurship and Small Business, 28(4), 492-503.	No	Little/None	194 online contributions	Roth and Dana (2016) use the netnography research method to study 194 contributions to an online forum in order to identify the themes and motives associated with individuals who identify as "self-made expats." The themes and motives that were induced included family background, nomadism, paradise, love, start-over, adventure, entrepreneurship, and definitions.
van der Laken, P., van Engen, M., van Veldhoven, M., & Paauwe, J. (2016). Expatriate support and success: A systematic review of organization-based sources of social support. Journal of Global Mobility, 4(4), 408-431.	No	Systematic	39 articles	Laken, Engen, Veldhoven, and Paauwe (2016) conducted a systematic review of organization-based sources of social support influence the success of individuals engaged in international assignments. This study synthesizes 39 empirical studies and draws on the theoretical paradigms of stress, social capital, and relational exchange.
Baruch, Y., Altman, Y., & Tung, R. L. (2016). Career mobility in a global era: Advances in managing expatriation and repatriation. Academy of	Yes	Systematic	Not specified	Baruch, Altman, and Tung (2016) systematically review the extant literature surrounding expatriation and repatriation including the emergence of studies that focus on self-

Management Annals, 10(1), 841-889.				initiated expatriates. The authors propose that the study of expatriates and other globally mobile groups should be viewed from a wider social-economic perspective that is offered through the career ecosystem theory. Additionally, an overarching framework for expatriation and repatriation is developed along with a process model and theoretical synthesis of current studies.
McNulty, Y., & Vance, C. M. (2017). Dynamic global careers: A new conceptualization of expatriate career paths. Personnel Review.	Yes	Standard Conceptual	Conceptual	McNulty and Vance (2017) propose a new conceptualization of expatriate career paths arguing that global careers unfold through an AE-SIE career continuum which varies along the line of individual/company control. The authors illustrate their proposed continuum by categorizing eight types of expatriates that are discussed in the literature which include: parent-country nationals, third-country nationals, expatriates of host-country origin/returnees, foreign executives in local organizations, permanent transferees, reverse expatriates, localized expatriates, and expatpreneurs.
Selmer, J., Andresen, M., & Cerdin, J. L. (2017). Self-initiated expatriates. In Research handbook of expatriates. Edward Elgar Publishing.	Yes	Deep	Conceptual	Selmer, Andresen, and Cerdin (2017) review the different ways that SIEs have been defined in the extant literature and explicate the self-starting, proactive, and persistent elements of self-initiation that have functional value for SIEs in their international contexts. Furthermore, the authors explore how time, motivation, and career can impact SIEs as

				well as highlighting the main characteristics of the internationally mobile talent pool.
Andresen, M., Dickmann, M., & Suutari, V. (2018). Typologies of internationally mobile employees. In <i>The Management of Global Careers</i> (pp. 33-61). Palgrave Macmillan, Cham.	Yes	Deep	Conceptual	Andersen, Dickmann, and Suutari (2018) identify and present the typologies found in the internationally mobile employee literature. Furthermore, the authors question the value of the fragmented literature by apply Asendorph and Neyer's (2012) general criteria (explicitness, consistency, completeness, parsimony, productivity, and applicability) as well as empirical anchoring and empirical verifiability criteria to the characteristics currently being utilized to distinguish internationally mobile employee types.
Hajro, A., Stahl, G. K., Clegg, C. C., & Lazarova, M. B. (2019). Acculturation, coping, and integration success of international skilled migrants: An integrative review and multilevel framework. <i>Human Resource Management Journal</i> , 29(3), 328-352.	Yes	Deep	Conceptual	Hajro, Stahl, Clegg, and Lazarova (2019) reviewed the expatriate literature (both AE and SIE) and identified how studies at the individual, organizational, and societal level can be meaningfully applied to the population of internationally skilled migrants. The differences between AEs, SIEs, and ISMs in the dimensions of time horizon, geographic origin and destination, motivation and personal agency, organizational support, vulnerability, status, and power, as well as commonly studied outcomes were highlighted. Additionally, a multilevel framework of ISMs' acculturation modes, coping effectiveness, and

				integration success was developed.
Conrad, H., & Meyer-Ohle, H. (2019). Overcoming the ethnocentric firm?—foreign fresh university graduate employment in Japan as a new international human resource development method. <i>The International Journal of Human Resource Management</i> , 30(17), 2525-2543.	Yes	Standard Conceptual	Conceptual	Conrad and Meyer-Ohle (2019) identify foreign fresh university graduates (FFGs) as a new category of international talent. A new framework is proposed that evaluates the viability of the international personnel development method utilized by a few Japanese firms that takes into account the diversity of the workforce and how distinct the employment practices are at the headquarters.
Andresen, M., Pattie, M. W., & Hippler, T. (2020). What does it mean to be a 'self-initiated' expatriate in different contexts? A conceptual analysis and suggestions for future research. <i>The International Journal of Human Resource Management</i> , 31(1), 174-201.	Yes	Systematic	Conceptual - 171 SIE articles	Andresen, Pattie, and Hippler (2020) systematically reviewed the SIE literature and found that the concept of initiative has not been thoroughly integrated into the field. Therefore, the authors conceptualize personal initiative, apply personal initiative theory to the study of SIEs, examine the sampling issues currently found in the literature, and show the value of employees that take initiative to potential employers. Furthermore, a research model is proposed which highlights how the self-starting, proactive, and persistent elements of SIE's personal initiative might lead to performance, job satisfaction, adjustment, and employability outcomes.
Harrington, B., & Seabrooke, L. (2020). Transnational professionals. <i>Annual Review of Sociology</i> , 46.	Yes	Deep	Conceptual	Harrington and Seabrooke (2020) review the sociological literature on transnational professionals and develop a classification of professions scholarship based on across/within

				nations/organizations dimensions. Additionally, the authors propose an occupational heirarchy based on autonomy and conceptual abstratction of the knowledge base whereby transnational professionsals hold the highest position, followed by state-licensed professionals, and ending with guild/union occupations.
Morence, C. F., Esteves, M. F., Silva, N. R., & Moreira, A. C. Types and Challenges of Expatriation. Encyclopedia of Organizational Knowledge, Administration, and Technology, 2522-2532.	No	Little/None	8 Articles	Morence, Exteves, Silva, and Moreira (2021) review eight articles and select fiive expatriate types to compare to one another. Additionally, the authors address the impact that the expatriate types might have on the economies.

Appendix B – SIE Definitions in Extant Literature

Authors	Year	Definition
Inkson, K., Arthur, M.B., Pringle, J., & Barry, S.	1997	traveling and working abroad for overseas experience
Inkson, K., Thomas, D.C., Barry, S.H.	1999	the person sets off on his or her own initiative, with little agenda beyond exploration, and no idea whether he or she will be returning in six weeks or six years
Suutari V., Brewster C.	2000	people heading overseas for a prolonged period of travel, work, and tourism
Bhuan, S.B., Al-Shammari, E.S., & Jefri, O.J.	2001	individually hired by foreign companies on contractual bases
Tharenou, Phyllis	2003	Young graduates self-initiating international work opportunities
Myers & Inkson	2003	stretches across years of experience rather than summer vacations and involves long periods of improvised employment as well as short episodes of holiday fun.
Inkson, K., Myers, B.A.	2003	A period of travel, exploration, and personal development.
Lee C.H.	2005	any individual who is hired as an individual on contractual basis and not transferred overseas by parent organizations
Vance, C.M.	2005	Someone who left his or her homeland to live or work in another country, usually for a long period of time.
Richardson J., Mallon M.	2005	None Found
Myers, B., & Pringle, J.K.	2005	Longterm individually-initiated travel to other countries to pursue cultural, personal and career development experiences.
Richardson J., McKenna S.	2006	people who have sought an overseas position independently
Richardson J.	2006	Those who elect to go overseas independently
Tams S., Arthur M.B.	2007	A voluntary or involuntary decision that is self-initiated whereby people undertake an international career move on their own behalf
Jokinen T., Brewster C., Suutari V.	2008	They have made their own way to the country and the job.
Peltokorpi V.	2008	any person who is hired on a contractual basis and not transferred overseas by the parent organization
Bozionelos N.	2009	individuals who take on expatriation on their own initiative and outside the boundaries of multinational corporations
Peltokorpi V., Froese F.J.	2009	who themselves make the decision to move and work abroad
Thorn K.	2009	long-term individually initiated travels to other countries to pursue cultural, personal and career development experiences
Biemann T., Andresen M.	2010	An individual who relocates voluntarily to a foreign country on his or her own initiative, independently of any employer and without organizational assistance, and is hired under a local, host-country contract

Cerdin J.-L., Le Pargneux M.	2010	Individuals who choose to go abroad on their own to find work there, without being sent by an organization from their home country.
Schoepp K., Forstenlechner I.	2010	those who take advantage of the employment opportunities available in a global economy with a shortage of skilled workers and who do so independently, or in other words, outside of the existing employment relationship.
Selmer J., Lauring J.	2010	Individuals who take personal responsibility of their career trajectories without the direct support of an organization. Any individual who is hired as an individual on a contractual basis and is not transferred overseas by a parent organization. Gainfully employed abroad and have acquired their job of their own volition without being assigned to the host location by an organization
Tharenou P., Caulfield N.	2010	Professionals who choose to expatriate and who are not transferred by their employer
Al Ariss A.	2010	SIEs are not sent by their companies but rather travel on their own initiative
Al Ariss A., Özbilgin M.	2010	Self-initiated expatriates are not sent by their companies but rather travel on their own initiative and thus do not benefit from organizational support.
Forstenlechner I.	2010	Those who take advantage of the employment opportunities available in a global economy with a shortage of skilled workers and who do so independently
Forstenlechner I.	2010	someone who elects to go overseas independently to foreign countries not through temporary assignments but on a voluntary, self-initiated basis
Howe-Walsh L., Schyns B.	2010	Employees who decide to migrate to another country for work.
Tharenou P.	2010	professionals who initiate and usually finance their own expatriation and are not transferred by their employer, instead they relocate to a country of their choice, often with no definite time frame in mind
Doherty N., Dickmann M., Mills T.	2011	Those who undertake international working without the sponsorship of an organization.
Selmer J., Lauring J.	2011	Any individual who is hired as an individual on contractual basis and not transferred overseas by the parent organization
Selmer J., Lauring J.	2011	Any individual who is hired as an individual on contractual basis and not transferred overseas by parent organizations
Tornikoski C.	2011	people sent abroad by their employer
Stalker, B. & Mavin, S.	2011	Those who choose to initiate their own expatriation.
Al Ariss A., Syed J.	2011	Self-initiated expatriates are not sent by their companies but rather travel on their own initiative
Felker J.A.	2011	individuals who ‘expatriate independently’ without the support or influence of any particular employer.

Myers, Barbara	2011	A period of autonomous travel and work in another country provides an opportunity for young women and men to experience considerable personal and career development
Froese F.J.	2012	people who, on their own volition and initiative, seek and find work overseas
Lo K.I.H., Wong I.A., Yam C.M.R., Whitfield R.	2012	None Found
Schoepp K., Forstenlechner I.	2012	Expatriates who take advantage of the employment opportunities available in a global economy with a shortage of skilled workers and who do so independently
Selmer J., Luring J.	2012	regular employment, foreign national and self-initiate
Yijälä A., Jasinskaja-Lahti I., Likki T., Stein D.	2012	Made the decision themselves to move abroad and do not follow a career path within a particular organization
Altman Y., Baruch Y.	2012	People who move geographically without organisational support and engender their own employment
Arp F.	2012	hold managerial positions in a country different from their country of origin, and work in the headquarters operations of organizations founded in that country.
Beitin B.K.	2012	people who have sought out education or careers outside their country of origin without the prompting of their companies.
Cao L., Hirschi A., Deller J.	2012	employees who are not assigned to another country by an organization but have instead chosen to move to another country to work and live on their own arrangement
Crowley-Henry M.	2012	None Found
Ellis D.R.	2012	long term individually initiated travelers to other countries to pursue cultural, personal and career development experiences
Shaffer M.A., Kraimer M.L., Chen Y.-P., Bolino M.C.	2012	Individuals who initiate and usually finance their own expatriation and are not transferred by organizations. They relocate to a country of their choice to pursue cultural, personal, and career development experiences, often with no definite time frame in mind.
van den Bergh R., Du Plessis Y.	2012	None Found
Berry, D.P. & Bell, M.P.	2012	Expatriates who use their own resources to move to another country for work.
Cao L., Hirschi A., Deller J.	2013	Have freedom of choices, are not sent abroad by their employer, and are currently working in or have had significant work experiences in the host country.
Froese F.J., Peltokorpi V.	2013	Not sent abroad by organizations but sought overseas experience on their own, driven partly by a desire to seek adventure and new experiences.
Isakovic A.A., Forseth Whitman M.	2013	those who self-initiate their own foreignwork experiences

Lauring J., Selmer J.	2013	individuals, who themselves make the decision to live and work abroad
Thorn K., Inkson K., Carr S.	2013	individual had willingly moved to the new location.
Arp F.	2013	None Found
Arp F., Hutchings K., A. Smith W.	2013	None Found
Doherty N.	2013	individuals take the initiative, independent of an employer, to move to a foreign location for employment, career and or travel or lifestyle reasons.
Doherty N., Richardson J., Thorn K.	2013	None Found
Guo C., Porschitz E.T., Alves J.	2013	employment, career and/or travel or lifestyle reasons.
Joshua-Gojer, A. Esther; Allen, Jeff M.	2013	Have been hired as an individual on a contractual basis and not transferred overseas by a parent organization
Scurry T., Rodriguez J.K., Bailouni S.	2013	Individuals who elect to go overseas independently rather than on international assignments for an employer, regardless of motive or duration.
Tharenou P.	2013	Professionals and managers who, unsupported by an organization, expatriate to seek work in a host country for an indefinite period, usually over a year
Ariss A.A., Crowley-Henry M.	2013	Internationally mobile individuals, who have moved through their own agency, rather than through an organizationally-assigned expatriation, to another country for an indeterminable duration.
Cao L., Hirschi A., Deller J.	2014	Individuals who are not assigned to another country by an organization but have instead chosen to work and live in another country on their own arrangement
Cerdin J.-L., Le Pargneux M.	2014	None Found
Lauring J., Selmer J.	2014	a person who is hired individually on a contractual basis and is not transferred overseas by a parent organization
Lauring J., Selmer J., Jacobsen J.K.S.	2014	people who choose to relocate on their own initiative, often without support of an organization
Nolan E.M., Morley M.J.	2014	any person who is hired on a contractual basis and not transferred overseas by the parent organization
Peiperl M., Levy O., Sorell M.	2014	move abroad of their own initiative, driven by an array of motivations such as the desire for adventure and exploration, life-change, and benefit to the family
Selmer J., Lauring J.	2014	None Found
Selmer J., Lauring J.	2014	None Found
Supangco V., Mayrhofer W.	2014	Working in countries other than one's own and spending own money to do so

Ren H., Shaffer M.A., Harrison D.A., Fu C., Fodchuk K.M.	2014	None Found
Andresen M., Bergdolt F., Margenfeld J., Dickmann M.	2014	individual who moves to another country, while changing the dominant place of residence, giving them migrant status, and executes legal work abroad with a new work contract partner, whereby the first key binding activity to move internationally is solely made by the individual who initiates the expatriation
Bjerregaard T.	2014	professionals who, on their own initiative take a job in a foreign country, often with scarce organizational support
Cerdin J.-L., Selmer J.	2014	expatriates who self-initiate their international relocation, with the intentions of regular employment and temporary stay, and with skills and or professional qualifications
Farndale E., Pai A., Sparrow P., Scullion H.	2014	Individuals who relocate voluntarily to a foreign country, without assistance, and are hired under a local, hostcountry contract
Muir M., Wallace M., McMurray D.	2014	Individuals who expatriate without the direct support of an organisation
Richardson J., McKenna S.	2014	initiate their own mobility within an organizational context under company sponsorship, support and or knowledge.
Rodriguez J.K., Scurry T.	2014	Individuals who independently elect to pursue careers overseas, without sponsorship from an employer
Valk R., van Engen M.L., van der Velde M.	2014	Professionals who independently, unsupported by an organization, cross both country and organizational boundaries to seek work in a new organization in a host country for an indefinite time period
Vance C.M., McNulty Y.	2014	act as free agents traveling on their own initiative to a foreign work environment to seek and secure employment for both economic and personal career development reasons
von Borell de Araujo B.F., Teixeira M.L.M., da Cruz P.B., Malini E.	2014	workers who voluntarily decide to live abroad
Alshahrani S.T., Morley M.J.	2015	Individuals who travel abroad independently without organisational assistance.
Andresen M.	2015	Searched for employment internationally on their own initiative in a new organization
Andresen M., Biemann T., Pattie M.W.	2015	person who is seeking employment abroad on his or her own initiative and is hired as a local in the host country
Selmer J., Lauring J., Normann J., Kubovcikova A.	2015	Seek employment abroad on their own initiative and are part of an international competition for jobs and for talent
Silvanto S., Ryan J., McNulty Y.	2015	None Found
Ryan J., Silvanto S., Ozkaya H.E.	2015	a migrant with special qualifications and characteristics who takes the initiative of moving abroad on their own, rather

		than seeking a domestic employer prepared to organise and support their international career aspirations
Farrer J., Greenspan A.	2015	None Found
Glasscock G., Fee A.	2015	people who instigate a temporary work placement outside their home country, and who are not assigned there by their employer.
Mahadevan J., Zeh J.S.	2015	None Found
Makkonen P.	2015	individuals who self-initiate their international relocation, with the intentions of regular employment and temporary stay
Makkonen P.	2015	Individuals who self-initiate their international relocation, with the intention of regular employment and a temporary stay
Miralles-Vazquez L., McGaughey S.L.	2015	People who, of their own volition, seek and find work overseas. They are gainfully employed in a position outside their home country, and were not sent there by an employer
Tabor A.S., Milfont T.L., Ward C.	2015	not about SIEs
Tharenou P.	2015	Managers and professionals who decide on their own initiative to expatriate to search for a job abroad, self-fund their expatriation without organisational support, for a temporary but undefined time, likely from over a year up to a decade, for career, professional, lifestyle, cultural and personal reasons, and usually employed on a host country-contract once there.
Vaiman V., Haslberger A., Vance C.M.	2015	individuals who self-initiated international relocation, have regular employment or intentions thereof, with intentions of a temporary stay, and possess skilled or professional qualifications
Despotovic W.V., Hutchings K., Mcphail R.	2015	individuals who independently choose to expatriate or relocate internationally
Ababneh K.I.	2016	Employees who choose to work in a foreign country independently rather than being sent by an organization as part of an expatriate assignment
Agha-Alikhani B.	2016	individuals who commence international work-experiences by themselves, pursuing individualized career goals outside of organizational boundaries
Selmer J., Luring J.	2016	A person who is hired individually on a contractual basis and is not transferred overseas by a parent organization
Shaffer M.A., Sebastian Reiche B., Dimitrova M., Lazarova M., Chen S., Westman M., Wurtz O.	2016	Individuals who initiate and typically finance their own expatriation, often with no definite time frame in mind but with the intention of returning to their home country at some point
Vijayakumar P.B., Cunningham C.J.L.	2016	None Found

Mohyuddin, Syed Mofazzal; Pick, David	2016	None Found
Baruch Y., Altman Y., Tung R.L.	2016	people who relocate to another country for work purposes and life style reasons, at their own initiative
Ceric A., Crawford H.J.	2016	individuals who relocate voluntarily to a foreign country, without assistance, and are hired under a local, host-country contract and activists who take control of their own careers in a highly proactive manner and operate with a high degree of personal agency
Clark D., Altman Y.	2016	None Found
Guðmundsdóttir S., Lundbergsdóttir L.M.	2016	employees who apply for a particular position in a host country where they will live temporarily
Makkonen P.	2016	self-initiate their international relocation, with the intentions of regular employment and temporary stay
McKenna S., Richardson J.	2016	an individual who expatriates from their home country to another of their own volition and independently of an organizational employer.
Pinto L.H., Araújo R.C.	2016	managers and professionals who decide on their own initiative to expatriate, self-fund their expatriation without organizational support, for a temporary but undefined time with the intention of a regular employment abroad
Roth S., Dana L.-P.	2016	Individuals who have been free to choose whether, where and how long to go abroad, have not been sent by an employer, and are currently working in their host country or have had relevant professional experiences there.
Schreuders-van den Bergh R., Du Plessis Y.	2016	None Found
Tung R.L.	2016	None Found
Vance C.M., McNulty Y., Paik Y., D'Mello J.	2016	None Found
Zakaria N., Yusuf B.N.M., Talib A.N.A., Zakaria N.	2016	None Found
Farcas D., Gonçalves M.	2016	they move abroad on their own volition, by personal funding, oriented towards personal goals and without any organizational support.
van der Laken P., van Engen M., van Veldhoven M., Paauwe J.	2016	None Found
Ballesteros-Leiva F., Poilpot-Rocaboy G., St-Onge S.	2017	Seek employment in the foreign country on their own initiative
Chen Y.-P., Shaffer M.A.	2017	SIEs instigate their own relocation to a country of their choice to pursue cultural, personal, and career development opportunities, often with no definite time frame in mind

Fu C., Hsu Y.-S., A. Shaffer M., Ren H.	2017	individuals must have regular employment or intend to be employed, plan to stay in the host country only temporarily, and have skilled or professional qualifications
Jannesari M., Wang Z., McCall J., Zheng B.	2017	a person who independently chooses to expatriate
Presbitero A., Quita C.	2017	moving to a country of one's choice to seek a job and to establish a more stable career
Ramalu S.S., Subramaniam C., Nadarajah G.	2017	None Found
Tang A.D., Chang M.-L., Cheng C.-F.	2017	those deciding by themselves to move and work in host country organizations or in international organizations in other foreign countries
Zhang K.Y., Rienties B.	2017	those who make their own decisions to work and live in a foreign country
Baruch Y., Forstenlechner I.	2017	individuals opt for global career moves, hoping to advance their careers
Danisman S.A.	2017	expatriates who are not transferred by a parent organization/institution, but who decide independently to make their own way.
Egilsson B., Dolles H.	2017	skilled individuals who pursue a temporary career abroad on their own initiative, primarily for work related reasons of performance and achievement, and secondly for pecuniary gain.
Farcas D., Gonçalves M.	2017	None Found
Haak-Saheem W., Brewster C.	2017	individuals who had made their own way to a job in another country and who were not employed on expatriate terms and conditions.
Kim K., Von Glinow M.A.	2017	individuals who initiate their own expatriation and are primarily driven by a complex set of personal interests and intrinsic motivations.
Makkonen P.	2017	individuals that self-initiate their international relocation, with the intentions of regular employment and temporary stay
McNulty Y., Vance C.M.	2017	None Found
Mielly M., Jones C., Smith M., Basistha V.	2017	employees not assigned to another country by an organization but rather having chosen to move to another country to work and live of their own volition
Myers B., Inkson K., Pringle J.K.	2017	an individual who expatriates voluntarily and without the support of an employing organization
Ballesteros Leiva F., Poilpot-Rocaboy G., St-Onge S.	2018	Seek employment abroad on their own initiative and are hired as local employees in the host country
Dickmann M., Suutari V., Brewster C., Mäkelä L.,	2018	SIEs are those who make their own way

Tanskanen J., Tornikoski C.		
Fontinha R., De Cuyper N., Williams S., Scott P.	2018	individuals who themselves make the decision to live and work abroad
Furusawa M., Brewster C.	2018	individuals who decide on their own initiative to live and work in foreign countries
Halim H., Bakar H.A., Mohamad B.	2018	Individuals who instigate their own travel in search of work in a foreign country.
Hussain T., Deery S.	2018	None Found
Lauring J., Selmer J.	2018	expatriates who are hired individually on a contractual basis and are thus not transferred overseas by a parent organization
Selmer J., McNulty Y., Lauring J., Vance C.	2018	Individuals who, initiate and usually finance their own expatriation and are not transferred by organizations; they relocate to a country of their choice to pursue cultural, personal, and career development experiences, often with no definite time frame in mind
Suutari V., Brewster C., Mäkelä L., Dickmann M., Tornikoski C.	2018	Foreigners working in the host country that make their own way to the job rather than being sent by their employer
Kuzhabekova A., Lee J.	2018	None Found
Rodríguez R.V., Yepes G.R.	2018	expatriates that have started their experience abroad by their own initiative
Deng, Jianbang	2018	individuals who undertake international work with little or no organizational sponsorship, and often with a less favorable local work contract.
Rajani, Namita;Ng, Eddy S;Groutsis, Dimitria	2018	who undertake international work with little or no organizational
Agha-Alikhani B.	2018	individuals deciding to look for work experience outside their home country on their own initiative
Cheng, James	2018	None Found
Colakoglu S., Yunlu D.G., Arman G.	2018	None Found
Kim K., Halliday C.S., Zhao Y., Wang C., Von Glinow M.A.	2018	individual who chooses to work and live abroad and who, with no support from an organization, initiates the process of expatriation.
Kraak J.M., Altman Y., Laguecir A.	2018	decide on their own initiative to expatriate to search for a job abroad, self-fund their expatriation without organizational support, for a temporary but undefined time for career, professional, lifestyle, cultural and personal reasons, and usually employed on a host country-contract once there
Langinier H., Froehlicher T.	2018	people hired on a contractual basis and not transferred overseas by the parent organization
Perera H.K., Chew Y.T., Nielsen I.	2018	None Found

Ridgway M., Robson F.	2018	an individual who has pursued, or may consider pursuing, employment overseas on his or her own initiative
Skovgaard-Smith I., Poulfelt F.	2018	None Found
Wechtler H.	2018	those who move abroad for work without the sponsorship of a specific organization
Furusawa M., Brewster C.	2019	individuals who decide on their own initiative to live and work in foreign countries
Jannesari M., Sullivan S.E.	2019	individuals who have chosen to relocate to a host country, often to experience different cultures or further develop their careers
Linder C.	2019	Individuals who relocate to a foreign country on their own initiative.
Lindsay V., Sharma R.R., Rashad S.	2019	Those who independently initiate their move to work in another country
Ramalu S.S., Subramaniam C.	2019	None Found
Meuer, Johannes; Tröster, Christian; Angstmann, Michèle; Backes-Gellner, Uschi; Pull, Kerstin	2019	Move abroad on their own initiative
Hussain T., Iren P., Rice J.	2019	individuals who decide on their own to expatriate to search for a job abroad and self-fund their expatriation without organizational support, for career, professional, lifestyle, cultural and personal reasons
Khedher H., Asadullah M.A.	2019	individuals who move abroad independently for work
Cho E., Chew I.A.	2019	individuals who take personal initiative to live and work abroad
Conrad H., Meyer-Ohle H.	2019	workers who commonly seek temporary employment overseas to gain international experience
Cura F.	2019	persons who explore overseas work by their initiation and free will.
Farcas D., Gonçalves M.	2019	on their own volition seek and find work abroad during a temporary period of time
Harry T.T., Dodd N., Chinyamurindi W.	2019	individual who has moved across national borders to take up legal, but time-bound long-term employment
Kumar R., Chhokar J.	2019	highly educated people that move abroad on their own for work
Latukha M., Soyiri J., Shagalkina M., Rysakova L.	2019	personally take responsibility of their careers without the direct support of an organization
Richardson C., Ng K.H.	2019	None Found

van Bakel M., Salzbrenner S.	2019	professionals who pursue a temporary career abroad on their own initiative, primarily for career-related reasons and secondly for pecuniary gain.
Hajro A., Stahl G.K., Clegg C.C., Lazarova M.B.	2019	individuals who initiate their expatriation without the help of an organization
Casado, Renata; Caspersz, Donella	2019	relocate voluntarily to a foreign country independent of any employer or organizational assistance and are hired under a local-country contract
Lawson, Sheron; Shepherd, Janice	2019	None Found
Andresen, Maike; Pattie, Marshall Wilson; Hippler, Thomas	2020	individuals are assumed to show personal initiative when relocating abroad
Shao J.J., Ariss A.A.L.	2020	skilled individuals from either developed or developing economies who move abroad on their own initiative without national sponsorship and take up full-time employment in a host country
Bozionelos N.	2020	individuals who engage in expatriation, which is planned and initially intended as temporary move of their main residence to another country, purely through their own initiative and resources
Fee A.	2020	None Found

Appendix C – Python Code Used to Conduct DPFA of SIE Definitions

Python code for: counters.py

```
import collections
from nltk.corpus.reader.api import CorpusReader as corpus_readers
import feather
import nltk
import os.path
import pandas as pd
import phrasemachine
from itertools import chain, dropwhile
from functools import reduce

def count_sent_window_coocs(doc, vocab=[], dist=0, window_size=2, pre=True, post=True):
    sents = [s.lower() for s in nltk.sent_tokenize(doc)]
    sent_words = []
    for s in sents:
        words = [w for w in nltk.word_tokenize(s) if w in vocab]
        sent_words.append(words)
    start = 0
    num_sents = len(sent_words)
    for cur_sent in range(start, num_sents):
        if post:
            s = min(cur_sent+dist, num_sents)
            e = min(cur_sent+dist+window_size, num_sents)
            post_context_sents = list(chain.from_iterable(sent_words[s:e]))
        if pre:
            s = max(cur_sent-(dist+window_size), start)
            e = max(cur_sent-dist,+window_size, start)
            pre_context_sents = list(chain.from_iterable(sent_words[s:e]))
        all_context_toks = [t for t in post_context_sents]
        all_context_toks.extend(pre_context_sents)
        for cur_tok in sent_words[cur_sent]:
            coocs[cur_tok].update(all_context_toks)
    return(coocs)

def count_word_window_coocs(doc, vocab=[], dist=1, window_size=5, pre=True, post=True,
stopwords=[]):
    """
    works
    """
    coocs = collections.defaultdict(collections.Counter)
    words = [w.lower() for w in nltk.word_tokenize(doc) if (w.isalpha() or '_' in w) and w not in
stopwords]
    start = 0
```

```

num_words = len(words)
for cur_word in range(start, num_words):
    if post:
        s = min(cur_word+dist, num_words)
        e = min(cur_word+dist+window_size, num_words)
        coocs[words[cur_word]].update(words[s:e])
    if pre:
        s = max(cur_word - (dist + window_size), start) - 1
        e = max(cur_word-dist, + window_size, start) - 1
        coocs[words[cur_word]].update(words[s:e])
return(coocs)

def count_docs_coocs(doc_list, vocab=[], dist=0, pre=True, post=True, what="words"):
    min_cooc = 2
    min_doc_char_length = 2
    dist = 1
    # a dictionary of counters: { coocs[word1][word2]:count }
    coocs = collections.defaultdict(collections.Counter)

    prog = 0
    for doc in doc_list:
        prog += 1
        if len(doc) < min_doc_char_length:
            continue
        if what=='words':
            this_coocs = count_word_window_coocs(doc, vocab)
        else:
            this_coocs = count_sent_window_coocs(doc, vocab)
        print("merging doc with corpus totals")
        for c in this_coocs:
            coocs[c].update(this_coocs[c])
    for c in coocs:
        for key, count in dropwhile(lambda key_count: key_count[1] >= min_cooc,
coocs[c].most_common()):
            del coocs[c][key]
    return(coocs)

def count_text_coocs(doc_list, vocab):
    """
    counts word co-occurrences in a list of text segments by updating a dict
    of collections.Counters
    """
    # a dictionary of counters: { coocs[word1][word2]:count }
    coocs = collections.defaultdict(collections.Counter)
    tok_docs = []
    prog = 0

```

```

for d in doc_list:
    prog += 1
    print('doing doc {0} of {1}'.format(prog, len(doc_list)))
    d = d.lower()
    tokens = [x for x in nltk.word_tokenize(d) if x in vocab]
    for i in range(0, len(tokens)):
        coocs[tokens[i]].update(tokens[:i])
        coocs[tokens[i]].update(tokens[i:])
    return(coocs)

def make_vocab(docs, min_freq = 2, stopwords = frozenset([]), punct = []):
    """
    Makes a simple word-frequency count over all documents. The keys to this
    dictionary are the words in the vocabulary, the values are their frequencies.
    Tokenized with nltk
    """
    vocab = collections.Counter()
    j = 0
    for d in docs:
        j+=1
        if j % 50 == 0: print('doing doc {0} of {1}'.format(j, len(docs)))
        words = []
        for w in nltk.word_tokenize(d):
            if w not in stopwords:
                words.append(w)
        vocab.update(words)
    cut_vocab = collections.Counter({k: c for k, c in vocab.items() if c >= min_freq})
    return(cut_vocab)

def read_vocab_csv(path, threshold=1):
    """
    read a vocabulary in the form of a word,count csv and return
    a collections.Counter of word frequencies for the corpus
    """
    print('reading vocabulary file')
    vtmp = open(path).readlines()
    vocab_counts = collections.Counter()
    for line in vtmp:
        if line.count(',') == 1:
            parts = line.split(',')
            word,freq = [parts[0].strip(), parts[1].strip()]
            freq = int(freq)
            if freq >= threshold:
                vocab_counts[word.strip()] = freq
    return(vocab_counts)

```

Python Code for: call_Counters.py -

```
#Import all functions from Counters.

from counters import *

#Instantiate a list for storing the data.

list = []

#Import stop words from NLTK

from nltk.corpus import stopwords

#Import Tokenize from NLTK

from nltk.tokenize import word_tokenize

#Define a function to remove all punctuation from the documents.

def Punctuation(string):

    # punctuation marks

    punctuations = "'!()-[]{};:'\",<>./?@#$$%^&*~'"

    # traverse the given string and if any punctuation

    # marks occur replace it with null

    for x in string.lower():

        if x in punctuations:

            string = string.replace(x, "")

    # Print string without punctuation

    return string

import os,glob

#Define the path to the folder where the files are stored.

folder_path = 'PATH_TO_FILE'
```

```

#Open each file that has the .txt extension in the folder.
for filename in glob.glob(os.path.join(folder_path, '*.txt')):
    with open(filename, 'r', errors='ignore') as f:
        #Read the text from the file.
        text = f.read()
        #Tokenize the text from the file
        text_tokens = word_tokenize(text)
        #Remove all stopwords from the tokenized corpus.
        tokens_without_sw = [word for word in text_tokens if not word in stopwords.words()]
        #Join all tokenized words into one string.
        filtered_sentence = (" ").join(tokens_without_sw)
        #Call the function Punctuation to remove all punctuation characters from the data.
        filtered_sentence = Punctuation(filtered_sentence)
        #Append the data to the list of data already analyzed.
        list.append(filtered_sentence.lower())
        #Console output commands.
        print (filename)
        print (len(text))
#Create a vocabulary from the list of analyzed data.
vocab = make_vocab(list)
#Identify the filepath to be used by Python.
os.chdir(folder_path)
myFiles = glob.glob('PATH_TO_FILE_withoutStopWords*.txt')

```



```

#Console output command.

print(myFiles)

#Output file name.

fname='cooc_output.txt'

#Include the io Library.

import io

#Call the function count_docs_coocs from the Python file Counters.py

cooc = count_docs_coocs(list, vocab, dist=0, pre=True, post=True, what="words")

#Open the ouput file.

with io.open(fname, "w", encoding="utf-8") as f:

    #Iterate throught the colocated items identified by the functions called.

    for k,v in cooc.items():

        # v is a reference to a dictionary, so iterate through that

        for item, qtt in v.items():

            #Write each of the colocated pairs and thier counts to the file.

            f.write(str(k) + "," + str(item) + "," + str(qtt)+"\n")

#Close the output file.

f.close()

```

Appendix D - Additional Articles Included in Systematic Review

Authors	Year	Article Title	Reason for Inclusion
Inkson, K., Thomas, D.C., & Barry, S.H.	1999	Overseas experience: Individual and national competitiveness (Cited by 29)	Although these are not peer reviewed publications, they are seminal pieces in SIE literature. All other SIE publications build off of the foundational works of Inkson and Myers.
Myers & Inkson	2003	The big OE: How it works and what it can do for New Zealand (Cited by 36)	Published in <i>Career Development International</i> , the term "Self-initiated Expatriate" had not been widely accepted yet.
Inkson, K., & Myers, B.A.	2003	The big OE: self-directed travel and career development (Cited by 367)	Published in <i>Journal of World Business</i> , presents taxonomy of self-initiating career path strategies for individuals looking for international business experience. This paper was also cited by many of the later studies.
Vance, C.M.	2005	The personal quest for building global competence: a taxonomy of self-initiating career path strategies for gaining business experience abroad. (Cited by 260)	Published in <i>Journal of World Business</i> , studies gender differences in the population of individuals with self-initiated foreign experiences (SFE). SIE terminology had not been widely adopted at this point.
Myers, B., & Pringle, J.K.	2005	Self-initiated foreign experience as accelerated development: influences of gender (Cited by 229)	Published in <i>Personnel Psychology</i> , this study examines expatriate retention and the complete sample is made up of SIEs.
Ren H., Shaffer M.A., Harrison D.A., Fu C., & Fodchuk K.M.	2014	Reactive Adjustment or Proactive Embedding? Multistudy, Multiwave Evidence for Dual Pathways to Expatriate Retention (Cited by 95)	

Appendix E – Journal Impact Factor Analysis from Systematic Review

Results from systematic search in SCOPUS, EBSCOhost, ProQuest, and PsycINFO using the terms found in the literature and used in previous literature reviews for self-initiated expatriation: ('self-initiated' and 'expatriate'), ('self' and 'initiated' and 'expatriate'), ('self-initiated' and 'expatriation'), ('self' and 'initiated' and 'expatriation'), ('self propelled' and 'expatriate'), ('self propelled' and 'expatriation'), ('self directed' and 'expatriate'), ('self directed' and 'expatriation'), ('self initiated' and 'foreign' and 'workers'), ('self initiated' and 'foreign' and 'employee'), ('self initiated' and 'corporate' and 'employee'), ('self initiated' and 'corporate' and 'expatriate').

Document Type	COUNT
Journal Article	248
Feature	16
Dissertation	15
Book Chapter	14
Review	9
Conference Paper	4
Book	3
Editorial	3
Erratum	2
Article in Press	2
Grand Total	316

Below is a list of the journals in which retained articles were published along with information related to how many articles were retained, the impact factor of those journals in 2017, the current ranking of those journals in the JHB database, and the latest/3-year/5-year self reported impact factors reported on each journal's website as of February 2020.

Journal	# of Articles from Journal	From 2017 Report		From JHB Database	Self Report from Journal Website		
		Impact Factor 2017	5 year impact factor	JHB	Latest Impact Factor	3-Year Impact Factor	5-Year Impact Factor
International Journal of Human Resource Management	28	2.425	2.709	B	3.150	2.71	3.46
Journal of Global Mobility	23	-	-	-	1.930	1.93	2.01
Career Development International	13	1.725	2.704	-	1.561	2.28	2.449
Journal of World Business	9	3.993	5.019	B	5.789	6.34	6.078
Thunderbird International Business Review	9	-	-	C	1.890	1.55	-
Personnel Review	8	1.395	1.942	K.R	1.362	1.95	2.03
Asia Pacific Journal of Human Resources	4	1.163	1.563	-	0.891	1.58	1.51
International Studies of Management and Organization	4	-	-	C	1.490	1.46	-
Journal of Management Development	4	-	-	-	1.690	1.73	-
Cross Cultural Management	3	1.800	1.583	-	2.619	-	-
Human Resource Management Journal	3	2.343	3.100	B	2.843	3.75	3.230
International Business Review	3	2.754	3.544	B	3.639	4.2	4.03
Asia Pacific Business Review	2	0.788	1.236	C	0.897	-	1.27
European Management Journal	2	2.369	3.412	B	2.985	-	3.61
European Management Review	2	1.250	2.095	B	1.600	-	2.59
Frontiers in Psychology	2	-	-	-	2.321	-	2.87
Human Resource Development International	2	-	-	K.R	1.980	1.72	-
Human Resource Management	2	-	-	B	2.934	4.28	4.34
Human Resource Management Review	2	3.276	4.201	B	3.625	4.97	4.7
International Journal of Cross Cultural Management	2	-	-	K.R	1.340	-	-
Journal of Pacific Rim Psychology	2	-	-	-	0.760	-	0.85
The International Journal of Human Resource Management	2	-	-	-	3.150	-	3.46
Translocal Chinese East Asian Perspectives	2	-	-	-	-	-	-
University of Auckland Business Review	2	-	-	-	-	-	-
Academy of Management Annals	1	9.281	17.129	A	12.289	16.16	18.616
Academy of Management Journal	1	6.700	11.254	A+	7.191	10.36	11.891
British Journal of Management	1	3.059	3.625	B	2.982	-	4.62
British Journal of Middle Eastern Studies	1	-	-	-	0.662	-	0.75
Canadian Ethnic Studies	1	-	-	-	0.070	-	-
Critical Perspectives on International Business	1	-	-	K.R	0.960	1.79	-
Cross Cultural Management: An International Journal	1	1.800	1.583	C	1.340	-	1.58
Current Psychology	1	-	-	-	1.468	-	1.58
Development and Learning in Organizations	1	-	-	-	0.340	0.32	-
Employee Relations	1	1.645	1.606	B	1.496	-	1.9
Equality, Diversity and Inclusion	1	-	-	-	1.280	1.15	-
European Journal of International Management	1	0.672	0.905	B	1.349	-	1.16
European Journal of Training and Development	1	-	-	-	1.210	-	-
Gender, Work and Organization	1	1.880	2.760	-	2.273	-	2.74
Global Business and Organizational Excellence	1	-	-	-	0.500	0.5	-
Global Networks	1	-	-	-	3.018	3.09	3.07
Human Relations	1	3.043	4.349	B	3.367	4.240	4.36
International Journal of Business and Globalisation	1	-	-	-	0.260	-	-
International Journal of Business and Management Science	1	-	-	-	0.430	-	-
International Journal of Entrepreneurship and Small Business	1	-	-	C	0.420	-	-
International Journal of Innovative Technology and Exploring Engineering	1	-	-	-	5.540	-	-
International Journal of Intercultural Relations	1	1.580	2.016	-	1.713	2.220	2.200
International Journal of Management Reviews	1	6.489	8.941	B	7.600	8.01	10.02
International Journal of Public Administration	1	-	-	C	1.210	-	-
International Journal of Training and Development	1	-	-	-	1.060	-	-
International Migration	1	-	-	-	0.150	-	-
Journal of Business Ethics	1	2.917	3.955	B	3.796	4.46	4.98
Journal of Cross-Cultural Psychology	1	1.348	2.229	B	1.416	-	2.26
Journal of Developing Areas	1	-	-	K.R	0.190	-	-
Journal of International Business Studies	1	6.198	8.446	A	7.724	8.12	9.71
Journal of International Entrepreneurship	1	-	-	C	2.360	-	-
Journal of International Management	1	2.798	3.535	B	2.830	-	3.76
Journal of Knowledge Economy & Knowledge Management	1	-	-	-	-	-	-
Journal of Management	1	8.080	12.043	A	9.056	10.96	12.91
Journal of Managerial Psychology	1	1.547	2.103	B	1.415	-	2.19
Journal of Occupational & Organizational Psychology	1	-	-	B	2.323	4.07	4.61
Journal of Studies in International Education	1	-	-	-	0.980	-	-
Journal of Vocational Behavior	1	3.052	4.200	B	3.387	4.8	4.65
Journal of Workplace Learning	1	-	-	-	1.660	1.63	-
Jurnal Komunikasi: Malaysian Journal of Communication	1	-	-	-	0.350	-	-
Lengua y Migracion	1	-	-	-	0.190	-	-
Management Decision	1	1.525	2.340	C	1.963	-	2.33
Personnel Psychology	1	5.523	7.353	A	6.930	7.1	7.92
Prometheus (United Kingdom)	1	-	-	-	0.580	-	-
Public Policy and Administration	1	2.438	N/A	K.R	1.813	2.31	-
Qualitative Research in Organizations and Management: An International Journal	1	-	-	-	0.700	-	-
Scandinavian Journal of Hospitality and Tourism	1	-	-	-	2.508	2.75	2.58
Social Sciences (Pakistan)	1	-	-	-	-	-	-
South Asian Journal of Human Resources Management	1	-	-	-	0.540	-	-
SpringerPlus	1	-	-	-	1.780	-	-
Team Performance Management	1	-	-	-	0.940	-	-
The Journal of Business Diversity	1	-	-	-	-	-	-
Women's Studies Journal (00497878)	1	-	-	-	0.040	0.1	-
Zeitschrift für Personalforschung	1	0.615	1.196	C	0.615	-	1.2

Appendix F – Future Directions in Extant SIE Literature

Authors	Year	Future Directions
Bhuiyan, S.B., Al-Shammari, E.S., & Jefri, O.J.	2001	The literature calls for further studies of SIEs in new contexts, for example, Saudi Arabia and other GCC countries, and with new samples. The finding pertaining to the negative influence of job autonomy should be further corroborated before a managerial direction can be given.
Tharenou, Phyllis	2003	Differences in the results between the young and older employees suggest some factors may not be as relevant for those who are older (e.g. outcome expectancies, international focus), but the results require replication. Future research should predict employees' responses to specific probable job relocation offers. Some measures also require further development (self-efficacy, stage of internationalization, environment). Future research requires longitudinal repeated data collections, which would allow the tracking over time of changes in receptivity and testing bidirectional links (Tharenou, 2002); for example, whether receptivity leads to selecting firms at higher stages of globalization.
Lee C.H.	2005	An inclusive sample of both male and female expatriates would increase the generalizability of the results obtained. A longitudinal approach to study underemployment among SIEs can better capture the economic and other significant events that may affect conditions in the organization, jobs and even in personal feelings and perception of SIEs. More work is needed to identify other specific individual difference variables that are closely tied to SIEs' overall sense of underemployment.
Jokinen T., Brewster C., Suutari V.	2008	Further research is needed to tell us whether these findings can be replicated for other groups. How do these findings compare to similarly qualified people who never left Finland? Are these findings unique to Finnish expatriates or are they shared elsewhere? Have these characteristics changed over time as the concepts of careers and development have changed? Possible differences between AEs and SEs in the end state level of global career capital remain a question. In addition, while the present data report experiences while the assignees are still abroad, the question of what happens to these assignees after repatriation remains largely unanswered. Previous research has focused on AEs, and it is unclear what happens to SEs when the assignment ends and there is quite often no guarantee about any repatriation position back in the home country.
Peltokorpi V.	2008	In future research, this calls for attention to a more holistic, process-oriented approach that utilizes longitudinal research design and a larger set of independent and dependent variables.

Bozionelos N.	2009	Field experimental designs, if feasible, may be of assistance in future research. future studies could take this (sophisticated forms of cultural training) factor into account in their designs. In addition to attitudinal criteria, future research could also employ criteria that reflect actual behaviors, such as voluntary turnover. Future research also should focus on longer-term outcomes of self-initiated expatriation. Such outcomes may include willingness to seek self-initiated expatriation again upon return to the home country, the career impact of the expatriate appointment, and the perceived benefits of the expatriate experience. Only additional research can address with certainty whether these apply to other professions and national cultural contexts.
Peltokorpi V., Froese F.J.	2009	Future studies could utilize performance evaluation archives or ask host country nationals to assess the level of expatriate work adjustment. Further studies are encouraged to test these relationships in other countries, especially non-Asian settings. Therefore, future research may benefit by integrating more antecedents that explain differences in OE and SIE adjustment. Given the unexpected results in regard to work adjustment, studies focusing on work adjustment and related work attitudes, such as job satisfaction, might help to provide further insight into this under-investigated area of expatriates' job attitudes.
Thorn K.	2009	Further study of the psychological dynamics of self-initiated international mobility is therefore required.
Biemann T., Andresen M.	2010	There is a need for comparative studies of SEs and AEs on the one hand and for a differentiation of research results according to their characteristics on the other hand. Further comparative studies based on managers and executives, who build the most important group within the expatriate population (Mahroum, 2000), can help to improve the knowledge in this field. When analysing data of international managers a distinction should be made regarding the beginning of their foreign assignment in order to ensure on the one hand that SEs are included in the sample and on the other that in case of mixed groups, research results are additionally analysed according to sub-groups. Also, more research is needed regarding repatriation and long-term career aspects of SEs. A longitudinal perspective on the careers of SEs can also be a fruitful avenue for further research, as the long-term effects of SEs might impact, for example, subjective and objective career success, areas of functional specialization, further psychological contracts or the work-life balance. Research is required on leadership issues of SEs in order to find out whether special management methods are needed for SEs and in how far existing methods for AEs are applicable. To this end the adjustment and retention of SEs needs to be understood. A relevant construct in this respect is the psychological contract between SEs and companies. In addition, a longitudinal analysis of the careers of SEs can provide

		further insights into the specific career pathways and aspects that characterize SEs.
Cerdin J.- L., Le Pargneux M.	2010	Further studies could test this internationalism measure on different kinds of samples. Other potential anchors such as “employability” suggested by Baruch (2004) could also be interesting to consider in future studies on various types of expatriates. Future research should examine if career anchors that are congruent with the international assignment lead to better performance. Future empirical studies also could compare AEs and SEs in terms of career motivations. Motivation factors related to personal and professional aspects would enable us to verify the relevance of the boundaryless career perspective.
Schoepp K., Forstenlechner I.	2010	Testing our findings across countries with different, but still high levels of expatriates such as the other GCC countries could provide further evidence whether there is, e.g. a correlation between the proportion of expatriates in the population and in-country variables specific to family adjustment. The inclusion of multiple professions in other research is warranted.
Selmer J., Lauring J.	2010	A longitudinal approach may be applied to capture processes over time to assess to what extent the perception of initial reasons to expatriate may change by time. Furthermore, future studies may target SIEs in business firms to test the validity of the findings of the investigation for this important group of SIEs. At the same time, the scope of this study may be extended to involve other personal characteristics likely to differentiate between reasons for SIEs to expatriate.

Tharenou P., Caulfield N.	2010	<p>Research needs to examine what prompts professionals to repatriate to developing countries and to a range of home countries that vary in culture. Research thus needs to examine the role that cultural distance plays in self-expatriates' return. A further area not examined was the influence of acculturation on the formation of a dual host—home country identity and whether professionals with a dual-country identity are less likely to return than those who maintain only a home country identity. Future research needs to measure the mediators of intention and satisfaction at different times than the determinants (push and pull factors) are measured. Despite the support given to their measurement properties, the measures of embeddedness used here are preliminary and would benefit from additional development. Career links need to be measured by items representative of the construct. In future research, other items should be added to the embeddedness measures to further test their effects. Examine the impact of specific types of shocks on return or examine the time elapsed between a shock and repatriation, requiring research in this area. Research needs to ask expatriates to rate whether particular events (that could cause them to consider return) have occurred and how much the events that occurred made them consider return. Research needs to assess whether those events that led to thoughts of return predict host country satisfaction, intent to return, job search, and return. Examine whether a variety of paths lead to repatriation, as they do in the unfolding theory of job turnover. Host country embeddedness may buffer the effect of shocks on intent to repatriate (Mitchell, Holtom, Lee et al., 2001), requiring research in this area. Men and women's repatriation may be subject to different influences owing to their possibly different family and career roles; hence research is needed into the interaction between career and family factors and gender. To fully apply job turnover theory to explain leaving a country, it may also be useful to examine intention to move out of a host country, job search outside the host country, and turnover that involves leaving the host country.</p>
Doherty N., Dickmann M., Mills T.	2011	<p>Future research could usefully poll larger samples of more diverse populations, in particular to explore any links between country of origin and host country to gauge the impact of global and local characteristics on decision making. Future research may focus on gathering fuller demographic and background details of the participants. This would help to contribute to a greater appreciation of the myriad players in the global business context, would facilitate the development of organisational engagement approaches and could inform individuals of the potential implications of a move abroad.</p>

Selmer J., Lauring J.	2011	The instrument used here to measure reasons to expatriate may have to be further developed and a longitudinal approach may be applied to capture processes over time to assess to what extent the perception of initial reasons to expatriate may change over time. Furthermore, future studies may target SIEs in business firms to test the validity of the findings of the investigation for this important group of expatriates. At the same time, the scope of this study may be extended to involve other acquired demographic characteristics likely to differentiate between reasons for SIEs to expatriate.
Selmer J., Lauring J.	2011	This calls for more research on expatriate gender roles. Although this investigation could be extended in many ways, as discussed above, a more direct comparison between OEs and SIEs would perhaps be preferable as the next step in trying to further examine the relationships between marital status, gender and work outcomes.
Tornikoski C.	2011	Greater clarification and consensus is needed on what components to include both in IPR (Intangible Particularistic Reward) and TUR (Tangible Universal Rewards), from a practical and academic point of view. Moreover, further research could contribute to the field of the psychological contract by considering SPC (State of the Psychological Contract) and several HRM practices at the same time and from a longitudinal perspective. Future research could examine whether perception differences (perception of breach relating to the delivery of a bundle of TUR) exist between various populations of employees such as AEs and SIEs.
Lo K.I.H., Wong I.A., Yam C.M.R., Whitfield R.	2012	The study has only focused on one place and one industry so that future studies can consider other industries or other countries. Being an SE indicates the presence of a cultural difference, but does not define that nature of the difference and we encourage future studies to incorporate these variables as antecedents and moderators in understanding the relationship between embeddedness and turnover. For example, it would be worthwhile to investigate if HomeCCE has the same effect on SEs from both individualistic and collectivistic cultures. Future research could consider a longitudinal perspective of the careers of SEs, from turnover intention to actual quitting, and include more types of shocks and how much these particular events have made SEs consider leaving. A longitudinal analysis and the inclusion of a wider variety of shocks as they occur and as managerial interventions are made to retain staff could be revealing. This can provide further insights into the specific career plans and expectations of SEs. There are also several other potential moderating and mediating factors (such as social support and organizational culture) that bear investigating.
Schoepp K., Forstenlechner I.	2012	Need for further examination into how professional role behaviours are impacted by expatriation.

Selmer J., Lauring J.	2012	<p>Theoretically, there may be a need to further refine the conceptual framework of behavioural intentions as reasons to expatriate and the categorisation of associated behaviour as affective and evaluative (Ajzen, 1991). It may also be worthwhile to try to take into account the change in social and cultural context, as is typical in expatriation, when discussing behavioural intentions in line with reasons to expatriate and subsequent behaviour consistent with the theory of planned behaviour (Ajzen, 1985, 1991, 2002). The findings of this article can be used as a point of departure for developing a more general theory for SIE reasons to expatriate. Future studies within this area may try to eliminate some of the weaknesses of the current investigation as well as extend its scope. For example, the instrument used here to measure reasons to expatriate may have to be further developed; some of the work outcome variables, such as work performance and work effectiveness, could be based on reports from supervisors to avoid a complete reliance on self-reports; and a longitudinal approach may be applied to capture processes over time, such as to assess to what extent the perception of initial behavioural intentions may change over time. Further quantitative studies may also incorporate how SIEs cope with structural barriers to their career development and to what extent they deploy transformation, entrepreneurship, maintenance, and opt out strategies as proposed by Al Ariss (2010). Furthermore, future studies may target SIEs in business firms to test the validity of the findings of this investigation for this important group of expatriates. At the same time, the scope of this study may be extended to involve other dependent variables likely to be affected by reasons to expatriate, such as for example different dimensions of adjustment.</p>
Yijälä A., Jasinskaja-Lahti I., Likki T., Stein D.	2012	<p>It may be of use to study the formation of organizational identification already at the pre-migration stage and then follow up after migration to observe the changes in organizational identification, as well as identification with other essential groups, such as team, workgroup and professional groups. Indeed, there is a need for more complex and in-depth analyses of the pre-migration stage of the relocation process (i.e. longitudinal studies focusing on two different time points in the pre-migration stage of the relocation process), as well as for more longitudinal research combining the pre- and post-migration stages of adaptation among highly skilled SFEs. Furthermore, the results of the study suggest that to gain a better understanding of overall adaptation processes, an approach that simultaneously takes into account the different domains of adaptation both in the pre- and post-migration stages of the relocation process is required.</p>

Cao L., Hirschi A., Deller J.	2013	<p>Future studies should employ longitudinal research designs to examine the potential causal relationship between the variables in our study. Future studies should pay particular attention to the impact of the respective labor market within which SIEs are operating (Harvey, 2009, Tharenou and Caulfield, 2010). Therefore we encourage researchers to explore more suitable means in social media for recruiting large samples of SIEs. the study should be replicated with samples from a broad spectrum of host and home countries in order to increase the generalizability of the theoretical framework.</p> <p>Furthermore, a protean career attitude might also have negative impacts on SIEs: Their independence, responsibility for their own career, and their high intrinsic motivation might make it difficult for them to commit to and identify with organizational goals and values. This possibility could be explored in future research. In addition, given the influential role of a protean career attitude on the entire SIE experience, further research could examine socio-structural, organizational, and individual factors that facilitate the development of SIEs' protean career attitudes.</p>
Froese F.J., Peltokorpi V.	2013	<p>Future studies could test whether our findings are generalizable to other contexts, particularly non-Asian contexts. future studies may want to collect data from secondary sources, for example cross-cultural adjustment assessed by spouses or HCN colleagues.</p> <p>Longitudinal data would help to better understand the time-related process of cross-cultural adjustment and to provide more solid evidence regarding causality. Future studies can test such differences in a more rigorous way and develop hypotheses based on experiential learning and LMX theories. Future studies may want to further explore the role of family. What role do these HCN spouses play in expatriate outcomes? Another under-researched but promising area would be the deliberate consideration of HCNs, including HCN supervisors, colleagues, subordinates and HCNs outside work (Toh and Denisi 2007; Haslberger and Brewster 2009). Furthermore, given the lack of evidence, future studies may want to investigate work performance of SIEs.</p>

<p>Isakovic A.A., Forseth Whitman M.</p>	<p>2013</p>	<p>Not only will further research be needed to determine how many of the results of this study are applicable only locally to academic SIEs in the UAE but also the research questions which have been asked in this study should be replicated with SIE groups in different geographical locations and in different employment categories and organizations. This would be particularly salient in testing for relationships between foreign language ability and the three facets of sociocultural adjustment. This factor's influence, or lack thereof, will only be confirmed when examined in a multitude of different linguistic and communication environments. From the perspective of using the Black et al. (1991) model of sociocultural adjustment as a theoretical framework to explain SIE adjustment, the factors included in the model, but not tested in this current study, need to be examined to discover if their influence is comparable to that which has been reported for OE adjustment. In addition, factors which are currently not included on the Black et al. model could be tested to see if inclusion would be warranted. Some of these factors could include age, education level, and motivation. Furthermore, some of the factors currently included in the Black et al. model could be studied through a refashioning of how those factors are defined. More specifically, as most factors in the model have been traditionally measured through quantity, an additional layer of quality should be embedded into each factor. In particular, the factor of previous overseas work experience should be operationalized through more qualitative descriptions.</p>
<p>Lauring J., Selmer J.</p>	<p>2013</p>	<p>It is, however, up to further research to verify these suggestions as well as to assess the importance of each of them. Future research could improve the methodology applied here as well as expand the scope. Replicating this study, future investigations could use more homogenous samples of private and public SIEs. Relying more on information from supervisors and colleagues, and applying a longitudinal design could assist in improving the reliability of the study. Also, expanding the scope of this exploratory pioneering study, involving SIEs in other host countries and better specifying what type of expatriates are being investigated, would be worthwhile endeavors. While the literature would suggest that the creativity in public organizations is mainly of an incremental nature while more radical creativity exists in the private sector, we do not know this for certain and especially not in the case of SIEs. More studies could assist in providing knowledge of this issue. Finally, since very few comparisons of employee creativity in private and public organizations have been carried out, the results of this study of SIEs could be used also to inspire further studies of regular employee creativity in the two different sectors.</p>

<p>Thorn K., Inkson K., Carr S.</p>	<p>2013</p>	<p>Other mobility behaviours could also be envisaged, such as the anticipated future location of these people. Could return propensity (an imminent return to the home country) or other current mobility intentions be predicted by motives for previous mobility? Further, is it possible to analyse such data at the level of each move? A longitudinal study could also be revealing. Mobility motivation may change over time, and its impact on mobility patterns could be informative. In our view, what is important in pursuing the direction suggested by our research is ensuring that analysis is conducted at the level of the individual and that this involves both subjective and objective components of mobility.</p>
<p>Doherty N.</p>	<p>2013</p>	<p>There is little focus on the possible transitions in status that SIEs may experience. For example, there is an opportunity to explore the shifts that SIEs may make between selfinitiated, company supported and migrant status. The gendered nature of some facets of the experience is an important issue worthy of further study. This would help to extend understanding and interpretation of the relationship between gender and mobility among SIEs. The importance of motivational aspects for these individuals in terms of both relevance and significance to their mobility and to the economies of host countries and organizations still requires attention. Specifically, there is a need to examine the relevance of SIEs as a corporate resource, as discussed next. Greater intention to return leads to increased job-search efforts at home and directly motivates repatriation. This research resonates with repatriation intentions among companybacked expatriates (Bhaskar-Shrinivas et al. 2005) and merits further exploration. In order to situate SIEs within an organizational context, it is necessary to understand more about the strategic ‘fit’ of different populations and the appropriate HRM approaches needed. The research stream on the nature of SIEs as a resource is emergent and requires further theoretical and empirical development to establish the contribution that SIEs may make to competitive advantage. In particular, as suggested by Kraaijenbrink et al. (2010), different levels of analysis (<i>individual and organizational</i>) need to be acknowledged, as this may contribute to the seeming disconnection between the individual-level capabilities of SIEs and their role as a corporate resource that can contribute to global talent flow. Therefore, for the study of SIE, the evidence base at a meso level will benefit from the extension of the theoretical underpinning for the study of the individual–organizational relationship. Therefore, there is considerable scope to contribute to research on the experience and relevance of career for SIEs. The multifaceted nature of career and career change for SIEs is ripe for further investigation. There is a need to build closer connections between the insights from the evidence base on SIEs and HRM theory and practice. In extending the research base on SIEs, it is important to ensure that enough detail about individuals and their experiences are</p>

captured, including variables such as home and host locations, motivation to move, demographic details, the type of employment in home and host countries and career outcomes. Further research is needed in order to gauge the magnitude of the population to provide evidence of the scale of SIEs as a potential global resource. In addition, further research to establish the generalizability of the findings of the current body of studies is particularly important at this juncture. Further research could explore issues such as intra and inter home and host country comparisons affecting the intention to become SIEs, exploration of the factors that affect intended and actual repatriation behaviour and the many facets of employment such as job satisfaction, organizational identification and commitment. Further research could usefully be done to validate constructs such as career anchors of SIEs. In order to fully explore this issue, further research could poll managers' perceptions of SIEs to provide data on how SIEs are perceived within the organizational context. One potential avenue for future studies could consider subjective career experiences (Ng et al. 2005). Ng et al. (2005) suggested that subjective career success is represented by career satisfaction rather than salary level or promotion. Given that SIEs appear intrinsically motivated, it would be beneficial to examine their levels of subjective and objective career success. One HRM concern about SIEs is their propensity to move and their potential to be less committed to an organization (Mayrhofer et al. 2008). While the literature suggests that they may be protean in their career orientation, there is a need to understand more fully how this affects their engagement with organizations. The concept of embeddedness considers the forces that keep people in their jobs, organizations and occupations. For the study of SIEs, this construct could be extended to location embeddedness in the sense of what Richardson and McKenna (2006) termed allegiance to home and host countries. These factors appear fundamental to the journeys that SIEs make. A key issue concerning the current publication base on SIEs is the need to connect the studies and the implications of the findings within a frame of reference that facilitates a more coherent approach to future research. In particular, there is a need to explore how individual-level variables can relate to the organizational level, further researching, for example, how the adjustment patterns among SIEs can connect to organizational performance. In addition, it would be helpful to document the capabilities of SIEs and develop further theoretical and empirical links between the type of jobs that SIEs hold, their individual-level career capital and the contribution they can make to organizational-level human capital. A further step in theoretical development is required to demonstrate whether and how the individual level career capital of SIEs can contribute to an organizational-level competitive advantage.

Cao L., Hirschi A., Deller J.	2014	Future studies could pay particular attention to the impact of family support and supportive immigration/re-emigration policies on SIEs' intention to stay in the host country. We encourage subsequent research to evaluate our theoretical framework with larger samples from other home and host countries. In addition, numerous new research questions could be explored regarding organizational support for SIEs. For instance, what contributes to SIEs' POS? Particular characteristics of the workplace, such as the nationality of direct supervisors and the cultural diversity of companies, could also be studied. A second open question concerns which specific organizational support measures can foster SIEs' career development and their integration into the host country in an intercultural context. Turnover intention or intention to stay in the current organization could be further research objectives. For example, social networks could be described with dimensions such as strength, structure or content (Seibert et al. 2001). These characteristics of social or career networks and their direct influences on SIEs could be theorized and examined in more detail, for instance with regard to their impact on career satisfaction and intention to stay. Finally, future research could compare the different effect of POS on expatriation in the context of AEs and SIEs.
Cerdin J.- L., Le Pargneux M.	2014	Collecting data on expatriates' performance is a difficult task which should be undertaken in future research. Two additional indicators could be empirically examined in future research, such as the accomplishment of organizational tasks and/or the achievement of key organizational objectives (e.g. Yan et al. 2002).
Lauring J., Selmer J.	2014	We suggest that future studies may focus on demonstrating that different demographic characteristics make certain levels of work outcomes more or less likely. The notion that demographic characteristics and individual orientation may interact in different ways is highly relevant for theory building regarding expatriate selection and expatriate management and should thus be included in further research.
Lauring J., Selmer J., Jacobsen J.K.S.	2014	Future research might also develop the instrument to measure work and tourism motives and target different types of sojourners and their partners and families in wider geographical areas. Future studies might also employ qualitative research designs to examine more in-depth why and how temporary work relocations may connect to tourism motivation (Lauring, 2008, 2011b, 2013b). Moreover, a multilevel statistical approach could be used to assess the level of individual embeddedness in the context. Researchers may also want to explore work- or career-related self-initiated experiences involved in more tourism-oriented travelling patterns.
Nolan E.M., Morley M.J.	2014	None Found

Peiperl M., Levy O., Sorell M.	2014	Thus, as self-initiated mobility is a widespread and significant phenomenon (Brewster and Suutari 2005), global career research needs to be expanded beyond the traditional focus on organizational expatriates.
Selmer J., Lauring J.	2014	An explanation for this could be that the DA construct is closely linked to the affective core of personality, which is known to be of great importance for initiating the adjustment process in a foreign country. This, however, has to be investigated more fully in future research that could expand and replicate the current study while trying to avoid some of its limitations. Future research could improve the methodology applied here, as well as expand the scope of the study. Future investigations replicating this study could rely more on information from supervisors and colleagues, and apply a longitudinal design. Expanding the scope of this pioneering, exploratory study by involving other host countries and better specifying the type of expatriates being investigated would also be a worthwhile effort. And including more work outcome variables, as well as searching for mediators and moderators in the analysis, could be a way forward for further studies on DA and adjustment of SIEs.
Selmer J., Lauring J.	2014	However, this exploratory study should be replicated in other locations and with other categories of globally mobile individuals.
Supangco V., Mayrhofer W.	2014	Future studies may use cross-cultural self-efficacy and the higher-order construct, cross-cultural PsyCap, which captures one's "motivational propensity when interacting across cultures" (Dollwet and Reichard, 2012, p. 6). On the other hand, the results also point to the need to develop measures of work adjustment that are more appropriate to settings other than what the measures originally conceptualized – that is, adjustment of Western expatriates in working in other parts of the world. Thus additional research is needed to validate these tentative conclusions about the role of self-efficacy in job satisfaction. Again, another aspect that needs research is the amount of time before the effects of support from the parent organization in terms of predeparture orientation and logistical support, for example, expire.

<p>Ren H., Shaffer M.A., Harrison D.A., Fu C., Fodchuk K.M.</p>	<p>2014</p>	<p>Therefore, the causal implications of our model should be interpreted cautiously, and we continue the call for more longitudinal designs in expatriate research. Future studies should examine the generalizability of our model to other self-initiated expatriates as well as traditional corporate expatriates. Still, it would be interesting for future research to examine whether proactive tactics play different roles for expatriates at different stages of their assignment. So will the use of proactive tactics change this U-curve progression of adjustment? In addition, what is the differential effectiveness of proactive behaviors over time? Do expatriates use different types of proactive behaviors at different stages of their international assignment? All these questions warrant future investigation. Future research is encouraged to explore other types of proactivity (Crant, 2000; Parker & Collins, 2008), such as proactive motivation (Parker et al., 2010) and proactive personality (Seibert, Crant, & Kraimer, 1999), to see whether they also contribute to the resource pathway of favorable expatriate experiences. So for expatriates, what are the distinctive roles that proactive behaviors and proactive personality play? The relationship between proactive personality and proactive behavior should also be explored (Li, Liang, & Crant, 2010). Still, we encourage future research to take a comprehensive perspective on embeddedness and investigate whether links and sacrifices also exert influences on expatriate retention. In addition to explaining retention, future research may also explore whether our proactive framework, or the focus on the resource pathway, helps explain other favorable expatriate experiences, such as performance, engagement, or thriving (Spreitzer, Sutcliffe, Dutton, Sonenshein, & Grant, 2005).</p>
<p>Alshahrani S.T., Morley M.J.</p>	<p>2015</p>	<p>Future research could take different approaches and examine international mobility among SEs and CEs from different stakeholder perspectives.</p>

Andresen M.	2015	<p>As we did not measure expatriates' turnover intention, we recommend future researchers analyze the correlation between performance and turnover intention of expatriates (Lee et al., 2004; Mitchell et al., 2001). Future research should consider how differences in international relocation mobility readiness (IRMR; Otto and Dalbert, 2012) influence job embeddedness and how it relates to performance. IRMR may be a major factor in predicting how employees get embedded in the first place. For example, if a person has a high one-off IRMR, the willingness to establish links and to fit in abroad might be higher. By contrast, in case of continuous IRMR, as seems to be more likely for SIEs than OEs (Biemann and Andresen, 2010), the willingness to strongly embed in the foreign organization and community might be low. The unconditional and conditional mediating effects in our study suggest that more research is needed to understand how expatriates perceive environmental cues to making resource investment decisions while abroad and in which way expatriation mode influences these decisions. In addition, as levels of job embeddedness are likely to develop over time, future research could employ longitudinal design to explore how the changing of job embeddedness influences expatriate performance as an outcome over time. An examination of intra-individual changes in perceptions and behaviors would help to address co-variation among constructs. Thus, more direct measures of job embeddedness based on COR theory would be helpful. We recommend revising the embeddedness scale to make it more comprehensive and developing an adapted version for the expatriation context.</p>
Andresen M., Biemann T., Pattie M.W.	2015	<p>Future research needs to distill SIEs into subgroups so that we can isolate what may be very different motivations, attitudes and behaviors. Future research should look at these expatriates across time to be able to determine causation. Researchers should investigate a much larger pool of expatriates than those from mostly Europe. Future research should explore these two kinds of expatriates in the perspective of a boundaryless and protean career while critically reflecting their explanatory potential and identifying SIE subgroups and their characteristics.</p>

<p>Selmer J., Lauring J., Normann J., Kubovcikov a A.</p>	<p>2015</p>	<p>Future research within this area may try to eliminate some of the weaknesses of the current investigation as well as extending its scope. Obviously, it would be interesting to see if our findings could be replicated in a study of SIEs in private businesses. Only a few comparisons between expatriate academics and business expatriates exist so there is little knowledge about this issue while many speculations subsist (e.g. Arp et al., 2013). Moreover, the attention on the impact of the institutional context on expatriate adjustment and performance could be expanded by further comparative studies of this relationship in other institutional environments than the ones presented in this investigation. This could, for instance, be done by conducting organization-wide studies at different geographical locations. An increasing number of academic institutions have offshore campuses in several countries and in that way resemble more traditional commercial MNCs (McDonnell& Boyle, 2012). In addition, more attention could be devoted to studies of the effect of the degree of internationalization in foreign and local organizations on expatriate adjustment and performance. The level of internationalization in terms of stock of expatriate employees varies greatly within many higher educational institutions (Froese, 2012), as well as within corporate businesses. The international characteristics of the organization could have effects on expatriate adjustment as well as organizational commitment among host-country nationals (Lo, Wong, Yam, & Whitfield, 2012).</p>
<p>Silvanto S., Ryan J., McNulty Y.</p>	<p>2015</p>	<p>The findings of this study could therefore be enhanced by in-depth interviews with, for example, assigned and SIEs as to why they choose particular countries to live and work in (see Andresen et al., 2014). Future studies would ideally seek to confirm or further test our findings by using the same or alternative research methodologies to identify other economic, social and institutional factors that might matter for attracting internationally mobile skilled professionals.</p>
<p>Ryan J., Silvanto S., Ozkaya H.E.</p>	<p>2015</p>	<p>Future researchers should seek to further investigate and understand the institutional factors that enable and constrain self-initiated expatriation. To more fully understand the phenomenon, it is necessary to continue studying the impact of factors such as the internationalisation of higher education, changes in visa regimes and treaties between countries on the movement of highly skilled individuals. Ideally, these studies should be undertaken using new sources of data and a range of different methodologies. Ultimately, they should lead to a better overall understanding of self-initiated expatriation as a macro and/or global phenomenon.</p>

Ababneh K.I.	2016	<p>Therefore, future research that employs longitudinal and experimental designs are necessary to confirm the direction of causality between the variables tested in this study. To gain further insights into the phenomenon of faculty turnover, future research needs to focus on actual faculty turnover. However, it would be more insightful for future research to incorporate and examine both the met expectations and the psychological contract theory/literature in the same study. Second, assessing expectations of new employees over time, identifying the reasons why expectations might grow or diminish, and identifying what strategies employees use to cope with unmet expectations are likely to shed further insights on the phenomenon of faculty turnover. Third, to shorten this study's questionnaire and to protect the privacy and anonymity of respondents, this study did not collect data on some useful variables, including job performance, participants' age, number and age of children, degree of met expectations of non-work-related aspects in the host country (e.g. housing, school system), normative commitment, and so forth. Collecting data on such variables is likely to enhance our understanding of the problem of faculty turnover and to strengthen the findings of the current study.</p>
Agha- Alikhani B.	2016	<p>Future research should thus draw on a comparison between SIEs (in corporate organizations) and SIAs (in academic institutions) or SIEs and AEs in order to test the transferability of our findings. Thus, an examination of whole networks would be something worthwhile looking at in order to capture reciprocal exchange processes and to gain a holistic picture about the relations of individuals embedded in social contexts. Thus, a longitudinal study that captures the volatility and change of social support networks and embeddedness domains at different points in time (e.g. before, during and after an international work period) might be an interesting area for future research. In order to overcome the limitations of this study future research designs should be applied that can account for the limited generalizability of this study. Thus, as this study can deliver findings from an in-depth scope into a research field that has been neglected so far and is able to draw a comparison from the two groups that were studied, it would be useful to build on the findings with a more quantitative and generalizable study in order to test and validate findings from the research field. Furthermore, a longitudinal research design could give insights into the development and change of social support networks of SIE and SIA. Questions that could be more closely related in future studies concern additional investigations of functions and support domains of the alters. Furthermore, a clear elaboration of the questions which alters hold which functions and how they influence expatriates' well-being, adjustment or performance (or other typical outcome variables) would supplement existing studies. Even though this study provides a starting point for the investigation of the alters</p>

		<p>functions and support domains, a follow up study on this aspects would be very fruitful. A clear elaboration of the question which alters hold which functions and how they influence expatriates' well-being, adjustment or performance could enhance social network and social support research immensely. Those questions, as well as questions about differences of social networks between different types of expatriates can be applied to SIE, AE, short term assignments, frequent flyers or other types of globally mobile individuals. Also the question of how sources in the home/host location and work/personal domain differ (and how this is different for SIE/SIA and AE) would provide innovative roadmaps for future research. Furthermore, aspects such as the volatility of social networks and their influence on social support of global nomads as well as the question of how networks can be maintained and individuals integrated into existing networks would be novel. And lastly, a more provocative question could be investigated regarding the aspect if there are network relations that have detrimental influence on expatriates' well-being. The elaboration of those aspects could enhance social network and social support research immensely.</p>
Selmer J., Lauring J.	2016	None Found
Shaffer M.A., Sebastian Reiche B., Dimitrova M., Lazarova M., Chen S., Westman M., Wurtz O.	2016	<p>Thus we urge future researchers to also test our measure with a multisource sample of global professionals and their spouses. Although we did establish measurement invariance across different cultural groups, it is advisable for the scale to be further tested with different cultural samples (e.g., Thomas et al., 2015). In addition, we encourage researchers to examine diverse samples including migrants, entrepreneurs, and other forms of global professionals. Although researchers can use existing measures of cultural adjustment and our new work- and family-role adjustment scale in conjunction with each other, we encourage researchers to also develop items that specifically tap into aspects of cultural adjustment for both work- and family-role adjustment. It would be fruitful for future research to identify additional distinct predictors, including both demands (e.g., role stressors) and resources (e.g., organizational support) for both forms of adjustment and for various global professional groups.</p>
Vijayakumar P.B., Cunningham C.J.L.	2016	<p>Future studies may increase the sample size to improve power of the study. Future research could more deeply delve into the issue of cross-cultural consistency in measurement focus and structure for these critical constructs. Future research could also examine other personal determinants of Indian expatriation decisions and eventual cultural adjustment, including personality traits, cultural differences in terms of power distance, prior international experiences and spousal/family dynamics as all of these factors are likely to influence decisions to expatriate and eventual cultural adjustment in one's host country.</p>

<p>Ballesteros-Leiva F., Poilpot-Rocaboy G., St-Onge S.</p>	<p>2017</p>	<p>The study findings are not generalizable and need to be confirmed with a larger sample and even using alternative measures and methods. Future studies ought to include the analysis of the effects of various individual features (e.g. personality, cultural intelligence) as well as the characteristics of the home and host cultures with respect to resources such as social support (family, co-workers, supervisors, organization) and the organizational values upon the IMEs' well-being. Previous research on domestic workers has shown that well-being can be linked with cultural factors; hence, future research could replicate the present study using IME populations from the same country or culture. Future research should make use of different methods and data sources. For example, the combination of data from the organization, supervisors, co-workers, and family members could increase understanding of the dynamics between life-domain interactions and IME's well-being. Future studies might also explore the similarities and the differences between SIEs and AEs, taking into account their age categories and career life stages. Finally, as our findings underscore the promising value of incorporating COR theory (Hobfoll, 1989, 2002) and the work-home resource model (ten Brummelhuis and Bakker, 2012), researchers should retain them to provide new insights into understanding the complex processes that contribute to IMEs' success.</p>
<p>Chen Y.-P., Shaffer M.A.</p>	<p>2017</p>	<p>Though researchers (e.g., Selmer & Luring, 2013; Selmer & Luring, 2016; Vaiman et al., 2015) have indicated that SIE academics can well represent general SIE professionals, we still urge future researchers to consider using samples comprised of SIE employees from other occupations to fully capture potential occupational effects on the dynamics we have observed. Along this vein, our argument in this study centers on the argument that autonomous motivation has a stronger effect for SIEs than for other types of expatriates. While we do not have data from corporate expatriates to examine this assumption, future research should explicitly test this using a corporate expatriate sample. Though we applied SDT in this study to assess the mediating role of motivation on POS – embeddedness relationship of SIEs, future research might examine the role of other mediators in these relationships. Future research addressing the role of basic need satisfaction on SIE motivation and embeddedness would appear promising. Along a similar vein, future researchers are encouraged to take a motivational perspective to study other types of expatriates (i.e. corporate expatriates, skilled immigrants) and to further explore the possible factors that contribute to their embeddedness (Tharenou, 2015). While the results of this research shed light on the research of SIEs and their embeddedness, future research could expand upon this study by investigating factors other than organizational support that influence SIEs' motivation and embeddedness. Specifically, we encourage researchers to</p>

		<p>acknowledge the influence of the host country environment as an important contextual factor on SIEs' perceived support and embeddedness. Finally, while this study focuses on the motivation of SIEs, we expect that the positive effect of autonomous motivation is not only limit to SIEs and we encourage future researchers to examine the influence of autonomous motivation on the career experiences of other global employees, such as traditional expatriates and international business travelers (Shaffer, Kraimer, Chen, & Bolino, 2012).</p>
<p>Fu C., Hsu Y.-S., A. Shaffer M., Ren H.</p>	<p>2017</p>	<p>Past research has found that pre-entry status, such as value similarity at entry (Chatman, 1991), newcomers' belief that good alternative work environments exist (Kammeyer-Mueller and Wanberg, 2003), and pre-entry knowledge about all aspects of the job (Kammeyer-Mueller and Wanberg, 2003) influence socialization outcomes. Future research of SIE socialization might benefit by incorporating these constructs in their models. Besides calculative commitment, future studies are encouraged to investigate other individual factors, such as self-regulated learning (Schunk, 1989) and achievement goal orientation (Locke and Latham, 1990), on SIE socialization process. Future studies are encouraged to examine the generalizability of our model. Future research might expand our study and examine whether organizational socialization predicts other non-work outcomes, such as work-family balance, community embeddedness, and family adjustment. Finally, although both NETs and principals participated in our survey, future research could also include HCNs, i.e., NETs' local colleagues to report how they interact with NETs, and how they are willing to facilitate NETs' socialization. Getting multiple perspectives from people around expatriates could shed light on the SIE socialization process.</p>
<p>Jannesari M., Wang Z., McCall J., Zheng B.</p>	<p>2017</p>	<p>Future studies should pursue a longitudinal study in order to study the role of psychological availability on adjustment during different phases. But, we didn't investigate how psychological availability cognitively, physically, emotionally effects this engagement, therefore, future research may need to take this matter under further consideration. Also in our sample from our HCNs participant the majority of them are female and that may signal that HCN females are more able to psychologically engage with their foreign colleagues than males. In the future studies other may wish to consider this issue. Finally, the model of this research was only conducted in a Chinese cultural context and we believe the results of this model will be different if they are conducted in another cultural context, therefore, we suggest in future research investigating the same model in another country or within different cultural context.</p>

<p>Presbitero A., Quita C.</p>	<p>2017</p>	<p>Future studies could look into the implementation intention, as well as the actual implementation and actualization of venturing into overseas careers. Future studies could examine other factors such as family-related variables (i.e., whether immediate members of the family have overseas careers), or types of jobs (i.e., whether one would be engaged in an in-demand job overseas). Future studies could also examine other demographic variables such as university majors, social class or travel experiences abroad. Future research can extend the nomological network of CQ by positioning it as a mediator. Similarly, career adaptability can also be positioned as a moderator or a mediator extending the construct's nomological network. Further studies could include career counsellors and other vocational professionals and the career interventions they are undertaking to help students who have high levels of intentions to take up expatriate careers.</p>
<p>Ramalu S.S., Subramania m C., Nadarajah G.</p>	<p>2017</p>	<p>It is suggested that future researcher should obtain data from large number of respondents covering all the universities in Malaysia for wider generalization. Additionally, longitudinal research design will provide greater understanding about the adjustment process of expatriates. Additionally, future research may include the possible moderating or mediating factors to understand better how various personal, organizational and contextual factors affects the outcomes.</p>

<p>Tang A.D., Chang M.- L., Cheng C.-F.</p>	<p>2017</p>	<p>Additional sources of support should necessarily be taken into consideration in further research. Some variables, such as mentors, co-workers (both local and overseas), external friends, along with other important ones (e.g. pre-departure cross-cultural training, acquisition of host country language), have demonstrated the potential determinants of internal marketing, expatriates' adjustment levels or their knowledge sharing. Also, knowledge sharing among SIEs can be challenging because of cultural differences. Thus, some cultural-related variables, such as culturally sensitive communication, cultural intelligence, would be of interest. Other potential factors, such as job positions, job type or marital status (Peltokorpi and Froese 2009; Luring and Selmer 2014), that may influence SIEs' adjustment or behaviour should be included in future research. Therefore, it would be informative and objective for future investigation to use more comprehensive knowledge sharing items that are rated by second party (e.g. immediate supervisors/leaders). Furthermore, the lack of a moderating effect of LMX in this study encourages future researchers to examine the processes by which LMX influences SIE perspectives. To obtain a more comprehensive insight into SET, samples of both local and overseas employees working in the same host country organization are necessary to identify whether internal marketing equally influences employees' work adjustment as well as their knowledge sharing. In addition, we did not compare SIEs with different nationality due to the small-size subsamples. Future research can collect sufficient cases of SIEs from each home country and compare the hypothesized framework among different nationality in the same host country. One more cultural value should be taken into consideration because of the absence of a moderating effect of LMX; that is, our research model needs to be replicated in other cultures where the individual role is more important than the team one (e.g. in Australia, Europe and the US). We suggest taking into consideration a shift from this current model to a hierarchical linear modelling design. Further research on expatriates would benefit from investigating expatriates who are nested in one organization and who share specific observations, in comparison with randomly sampled expatriates. This could provide readers with a comparative view of internal marketing's effects on SIEs' adjustment and knowledge sharing. In addition, a longitudinal design should be considered in order to provide a meaningful contribution towards understanding the causal relationship between organization variables (such as, internal marketing, perceived organizational support) and individual variables (such as SIE adjustment and behaviour).</p>
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Zhang K.Y., Rienties B.	2017	Future research in exploring how various elements based on the PC differ between OEs and SIEs is required. A potential avenue for future research is to extend the discussion to both employers and employees. One potential avenue for future research is to take into consideration the notions of social networking in how OEs and SIEs develop webs of certainty and connections with host-national workers, employers and the wider social network.
Ballesteros Leiva F., Poilpot- Rocaboy G., St-Onge S.	2018	Since all these aspects limit the generalizability of the findings, the study should be replicated with other IME samples and subsamples and using alternative measures of the variables. Future studies should confirm or investigate further the relationship between the life-domain support provided by family and friends, employers and coworkers and IMEs' perceived life-domain interactions. It could also be important to further investigate the difference between SIEs and AEs, given a recent review of empirical research on the relationship between organization-based social support and the success of international assignments that concludes with the importance of taking into account the characteristics of the expatriates and their assignment (Van der Laken et al., 2016). Future studies ought to entail the analysis of the effects of various personal resources on IMEs, namely physical (i.e., energy, health), affective (i.e., mood, empathy), intellectual (i.e., skills, experience), capital (time, money) and psychological (i.e., optimism, intensity of life-domain goal pursuit, resilience, self-esteem or core-self evaluations) as these resources affect the individuals' aptitude to cope with stress and life-domain interactions (St-Onge et al., 2010). Likewise, researchers should investigate the gender differences between IMEs, since domestic research has shown that employees may be influenced differently by gender roles, cultural norms, social power, etc. (Clark et al., 2015; Ballesteros-Leiva et al., 2016).
Dickmann M., Suutari V., Brewster C., Mäkelä L., Tanskanen J., Tornikoski C.	2018	Overall, another contribution of our study is to urge the further development of models of career capital (DeFillippi and Arthur, 1994; Inkson and Arthur, 2001; Parker, Khapova, & Arthur, 2009), informing models of global careers (Peiperl and Jonsen, 2007) to more explicitly incorporate aspects of quality and context over time.
Fontinha R., De Cuyper N., Williams S., Scott P.	2018	An important route for future research could be to test these underlying dynamics, preferably with a longitudinal design. Future research should try to replicate our findings among other groups of SIEs to investigate whether they would be consistent in different contexts (i.e., different expatriates and different host countries). It is also important to note that these results were obtained before the "Brexit" referendum result, supporting the United Kingdom's

		withdrawal from the European Union. It would now be particularly relevant to assess whether the perceptions of Portuguese SIEs have changed in the wake of the referendum result.
Furusawa M., Brewster C.	2018	We might speculate that the more distinct the culture, the more valuable such SIEs can be, but future research can help to assess this.
Halim H., Bakar H.A., Mohamad B.	2018	Given the foregoing considerations, future studies in the same area should consider a bigger number of academic expatriates residing in Malaysia. A wider sample size and representation of academic expatriates from diverse cultural backgrounds could yield towards the generalization of research findings.
Hussain T., Deery S.	2018	However, future research would benefit from using multiple sources of data collected at different points in time which could also assist in making causal inferences about the relationships (Finkel, 1995). Nevertheless, future research should seek to obtain data on the actual turnover of self-initiated expatriates and investigate how turnover intentions actually lead to subsequent quitting behavior (Hom, Mitchell, Lee, & Griffeth, 2012). This could involve an examination of the effect of alternative job opportunities and the process of job search (Steel & Lounsbury, 2009).
Lauring J., Selmer J.	2018	However, the relation between emotional control and other work outcomes, such as turnover intentions, affective commitment, and career advancement, could also be explored in future studies. Further, adding more variables focusing on mediating relations could potentially provide more explanation to how trait anger and self-control affect satisfaction and performance. Future studies could also look more into the role of individual motivation that could potentially explain the lack of support for some of our moderation hypotheses. Finally, using a longitudinal research design could improve the validity of the findings.
Selmer J., McNulty Y., Lauring J., Vance C.	2018	Beyond the focus of our present study, future research should continue to examine the role and placement of expat-preneurs as we have characterized them (self-initiating in their entrepreneurial activity from predominantly developed countries) within the broader conceptual framework of IE inclusive of diaspora and migrant entrepreneurs (Elo 2016; Mainela et al. 2015). From the diaspora entrepreneurship literature, we recognize that there also are smaller numbers of individuals from developing countries who are not pushed to migrate only by necessity, but who choose to become diasporans to fulfill their entrepreneurial career goals and dreams (Vissak and Zhang 2014). More research is needed to examine commonalities and differences between these upwardly mobile and career-oriented diaspora entrepreneurs and expat-preneurs.

Suutari V., Brewster C., Mäkelä L., Dickmann M., Tornikoski C.	2018	Future qualitative research is therefore needed to further analyze the role of career structure and agency for SIEs and AEs, whether they act differently in different career markets how they react to the career structures within their organizational context, what sort of agentic behaviour is enacted in response to particular career contexts and to discern the effects of such activities on their careers. There is a real need for more studies that survey representative samples of complete categories of workers and for more studies of the careers of internationally mobile workers that cover a longer time period. It would also be worthwhile analyzing whether the career findings would be different if international job markets were further divided into the previous host country versus other foreign countries. Whilst the impact on adjustment seems obvious, there does not seem to be any theoretical reason why there should be such an impact on career, but this is ripe for further empirical research.
Furusawa M., Brewster C.	2019	The survey method is cross-sectional and longitudinal perspectives would improve future research.
Jannesari M., Sullivan S.E.	2019	Future studies should use longitudinal designs in order to capture possible changes in SIEs' career adaptability, performance, and adjustment over time. Moreover, multi-source data should be collected. In addition to SIEs' self-reported performance ratings, HCN coworkers and supervisors should be asked to provide performance evaluations of the SIEs. Future research should examine whether the results of this study hold for SIEs working in other cities in China and in countries with different economic and political contexts than China. Future studies should include "hidden expatriates" (Haak-Saheem and Brewster, 2017), who tend to be employed in manual or menial jobs with no benefits and relatively poor work contracts. Future research should examine how the career adaptability of SIEs in different job categories (e.g., professionals, blue collar, and service) may influence their performance and adjustment. The study of SIEs may be advanced by using a career lens such as that used in this study. Scholarship on SIEs should explore career issues, such as whether different career orientations and motivations (e.g., protean, kaleidoscope) influence SIEs' career adaptability over different career stages. Additionally, how SIEs' career adaptability may influence performance and adjustment across different types of global work assignments (e.g., assignments of various lengths or in different country contexts) and as the non-work aspects of SIEs' lives evolve and change (e.g., marriage, having child or eldercare responsibilities) are areas deserving of future study. Future studies should expand this focus by considering, for example, how relationship quality between SIEs and HCNs potentially influences the career adaptability and performance of both SIEs and HCNs. Future research should explore how career adaptability may influence the adjustment of working

		adults to other types of career transitions (e.g., lateral transitions, lay-offs, retirement). Future research could examine potential mediation or moderation of the relationship between career adaptability and career success by factors including job or career satisfaction.
Linder C.	2019	I encourage future research to investigate in greater depth the relation between on-the-job factors and off-the-job factors in international assignments. First, there are several approaches to analyzing different kinds of expatriates, but we did not know much about the individuals that make up these groups. As an example, it is clear that SIEs apply for jobs abroad across organisational borders. However, a little is known about their particular reasons and motives. They choose different ways to gain foreign expertise than AEs, but to understand their motives in detail, more qualitative research is needed. For instance, it was assumed that SIEs have higher inter-organisational mobility, but it may be that they simply do not have the opportunity to go abroad with their current employer. Qualitative research may help to differentiate this in more detail. Second, the way that employers understand different kinds of expatriates is largely unknown. There is evidence that each international experience is appreciated differently and that, overall, the experiences of SIEs are less valued than those of AEs. This may indeed affect organizational embeddedness. To theorise on this issue at present is not easy, as evidence from the employer side is unavailable. As such, further research could provide insight into expatriates in relation to their employing organisations.

<p>Lindsay V., Sharma R.R., Rashad S.</p>	<p>2019</p>	<p>The role of gender on SIE repatriation undoubtedly warrants further research. Although mostly well studied in the AE repatriation literature, areas requiring further validation and research in terms of SIE repatriation include: the impact of dual-career couples on intention to return (Selmer and Lauring 2011), the role of family and children in this decision (Van der Velde, Bossink and Jansen 2005), the impact of social and work-related networks, as well as considerations of gender and ethnicity on the intention of SIEs to repatriate. In terms of contextualisation, country context is an important consideration. Decisions made by SIEs are context (country) bound, since attractiveness of push and pull factors is a relative concept, depending on the particular host and home countries involved (Guo, Porschitz and Alves 2013). However, seldom are the relative impacts of these factors considered; for example, home-country lifestyle benefits may be seen as attractive when compared to some host countries, but not when compared to others. We support other researchers (e.g. Al Ariss and Crowley-Henry 2013 in arguing that the interplay between home- and host-country contexts needs further investigation; this also extends to a need for developed vs developing country contexts (Al Ariss and Ozbilgin 2010). This highlights the need for a deeper knowledge of the multi-level and multi-faceted nature of the SIE repatriation phenomenon (Al Ariss and Crowley-Henry 2013; Doherty, Richardson and Thorn 2013b). Longitudinal studies could use the well-established life course paradigm (the social forces that have shaped the individual's development – Elder 1994) to examine of the impact of the expatriate's life course on the repatriation decision. Finally, while our study indicated that additional factors and interactions played a role in SIE ITR, these findings require validation, as well as in-depth qualitative investigation, in order to better understand how and why these factors impact an SIE's ITR.</p>
<p>Ramalu S.S., Subramania m C.</p>	<p>2019</p>	<p>While the findings of this study shed light on expatriate academics and their work attitude, future research could expand upon this study beyond CQ (cultural intelligence) by investigating a comprehensive list of resources available on expatriate academics covering factors related to personal, organizational, and social/contextual resources that influence WE (work engagement) and PNS (psychological needs satisfaction). Resources embedded in social networks within and outside the work environment could be important determinants of expatriate academics' behavioral outcomes. Additionally, future research may include other possible moderating or mediating factors to understand better how various resources affect expatriate academics' outcomes. Finally, as the findings of this study show, the positive effects of CQ on WE and PNS are not limited to expatriate academics; hence it is recommended that future researchers examine</p>

		similar predictors and outcomes on other segments of self-initiated expatriates or organizational expatriates.
Meuer, Johannes; Tröster, Christian; Angstmann, Michèle; Backes-Gellner, Uschi; Pull, Kerstin	2019	This limitation in our data should be seen as a call for more expatriation research on culturally diverse samples and asks for future research to pay more attention to the cultural distance between expatriates' home and host country (Chen, et al., 2010; Van Vianen, et al., 2004). Future research may test whether repatriation intention is indeed associated with differences in the expectations of AEs and SIEs regarding their professional and social environment in the host and home country.
Hussain T., Iren P., Rice J.	2019	Future research should also include leader perspective (Volmer et al., 2012) to obtain a more comprehensive idea of the relation between LMX and SIEs' IWB. Future research would benefit from comparing IWB of SIEs working in different host countries to allow for better generalizability of the research results. In order to validate the effects of these interactions on employees' IWB, they should be studied in different contexts.
Ren H., Shaffer M.A., Harrison D.A., Fu C., Fodchuk K.M.	2014	Therefore, the causal implications of our model should be interpreted cautiously, and we continue the call for more longitudinal designs in expatriate research. Future studies should examine the generalizability of our model to other self-initiated expatriates as well as traditional corporate expatriates. Still, it would be interesting for future research to examine whether proactive tactics play different roles for expatriates at different stages of their assignment. So will the use of proactive tactics change this U-curve progression of adjustment? In addition, what is the differential effectiveness of proactive behaviors over time? Do expatriates use different types of proactive behaviors at different stages of their international assignment? All these questions warrant future investigation. Future research is encouraged to explore other types of proactivity (Crant, 2000; Parker & Collins, 2008), such as proactive motivation (Parker et al., 2010) and proactive personality (Seibert, Crant, & Kraimer, 1999), to see whether they also contribute to the resource pathway of favorable expatriate experiences. So for expatriates, what are the distinctive roles that proactive behaviors and proactive personality play? The relationship between proactive personality and proactive behavior should also be explored (Li, Liang, & Crant, 2010). Still, we encourage future research to take a comprehensive perspective on embeddedness and investigate whether links and sacrifices also exert influences on expatriate retention. In addition to explaining retention, future research may also explore whether our proactive framework, or the focus on the resource pathway, helps explain other favorable expatriate experiences, such as

		performance, engagement, or thriving (Spreitzer, Sutcliffe, Dutton, Sonenshein, & Grant, 2005).
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Appendix G – Addressing Criticisms of COR Theory

The conservation of resource theory has encountered scholarly criticism, which I address in the following paragraphs. First, I address one of the most common criticisms of the COR theory which revolves around defining resources. Second, I explicate how individuals determine the value of resources. Third, I highlight how resources are conserved and acquired. Finally, I outline how resources have been measured in extant studies that draw from COR theory.

Resource Definition (Addressing Resource Ambiguity and Tautology)

Resources are at the core of the conservation of resource theory, which is a needs-based motivational theory that explains why humans acquire and conserve resources that are instrumental to their success. Hobfoll (1989) was the first to propose broad resource classes or kinds of resources: mastery (Pearlin & Schooler, 1978), socioeconomic status (Worden & Sobel, 1978), and self-esteem (Rosenberg, 1965). Subsequent early researchers further extended this list to 74 different resources (Hobfoll, Lilly, & Jackson, 1992; Lane & Hobfoll, 1992). These researchers encountered difficulties when creating the list of resources because Hobfoll's (1989) definition of resources, "those objects, personal characteristics, conditions, or energies that are valued by the individual or that serve as a means for attainment of these objects, personal characteristics, conditions, or energies" (p. 516), was criticized for being ambitious and inherently tautological (Gorgievski, Halbesleben, & Bakker, 2011).

To address the critical issue of COR's original definition of resources put forward by Hobfoll (1989), Halbesleben, Neveu, Underdahl, and Westman (2014) offered a revised definition of resources which brings clarity to the construct as well as provides a framework for resource categorization (i.e., objects, states, and conditions). However, this contribution was not sufficient because categorizing and identifying resource pools is not the same as defining resources.

Additionally, the term “value”, which indicates that a resource will lead to a favorable outcome in order for it to be considered a resource, confounds the resource and its outcome. Moreover, the newly proposed definition appeared open-ended claiming that a resource is, “anything perceived by the individual to help attain his or her goals” (Halbesleben et al., 2014: 5).

The suggested focus on goals places the COR theory among many other motivation theories such as self-determination theory (Gagne & Deci, 2005), goal-setting theory (Locke & Latham, 1994), expectancy theory (Vroom, 1964), control theory (Klein, 1989), and others (Elliot & Dweck, 1988; Bargh & Ferguson, 2000). Although the goal-based definition of resources allows for an open-ended number of resources to be considered, the focus on goals, rather than the ‘value’ of a resource, decouples the resources from the outcomes that might follow. The new definition emphasizes, “the perception that a resource could help an individual attain a goal, not that a resource was successful in facilitating goal attainment” (Halbesleben et al., 2014; p. 6).

The ability to utilize any given resource to achieve a goal or multiple goals can change depending on the context (Halbesleben et al., 2014). Researchers examined the role equifinal resources play on multifinal outcomes, suggesting that individuals can substitute resources that they have at their disposal in order to attain their multiple goals and subgoals (Kruglanski, 1996; Kruglanski, et al., 2013). Moreover, changing contexts requires individuals to re-evaluate and change their goals and resource allocations in order to maximize fit and achieve success (Kaplan & Gangestad, 2005). Ultimately, goal attainment does not depend on the quantitative degree of resources available to an individual, but rather on their efficient resource allocation that may lead to maximum fit (Hobfoll, 1988).

Determining Resource Value

Resources are those things that individuals perceive will help them achieve their goals, and as such the number of things that can be considered resources is extensive. Therefore, how individuals determine whether or not a resource will be valuable in order to achieve their goals is important to understand (Hobfoll, 1989). Personal and cultural factors influence how an individual assesses the value of a resource. At the individual level, the degree to which a resource is perceived to aid in personal goal attainment will impact a resource's value (Hobfoll, 2001). For example, self-determination theory posits that individuals need autonomy, competence, and relatedness (Deci & Ryan, 2000) and that the satisfaction of those needs can lead to the satisfaction of the innate goal of intrinsic motivation, which ultimately results in greater well-being.

Autonomy, competence, and relatedness have each been examined under the COR lens but the extent to which resources are valued in achieving each goal will vary depending on the environment (Baard, Deci, & Ryan, 2004). Additionally, the foundational need is autonomy due to its impact on goal achievement and resource valuation (Trougakos, Hideg, Cheng, & Beal, 2014). This is because autonomy allows individuals to increase the value of competence-based and relatedness resources as well as influence demands which can lead to improved performance (Kuhnel, Sonnentag, & Bledow, 2012). Furthermore, at the personal level, "individuals place the highest value on the satisfaction of the autonomy need, and resources that move them toward such need satisfaction would be assessed as having higher value" (Halbesleben et al., 2014: p. 9). In sum, at the individual level a resource will be valued to the extent that it is perceived to achieve a goal (e.g., autonomy, competence, relatedness).

Additionally, possession of a resource can increase its value relative to a resource that is not possessed. This interrelationship is one of the core underlying assumptions in COR that

states, “resource loss is more salient than resource gain” (Halbesleben et al., 2014: p. 4).

Furthermore, resources that are perceived to be complementary and reinforce existing resources will be more valued than those resources that do not complement. For example, due to the fact that resources must be managed and deployed, “if new resources do not complement existing resources, it may be more difficult to manage and thus be less valuable to the individual” (Halbesleben et al., 2014: p. 12). In sum, increased value is attributed to those resources that (1) are perceived to be helpful in goal attainment, (2) are already possessed, (3) complementary to existing resources.

Resources that are valued at the individual level must be also valuable to others within a society or they will not produce returns when they are invested. Those resources that are stable over time in a particular culture generally fall under the categories of objects or conditions (Brummelhuis & Bakker, 2012). These objects and conditions, which are known as macro-resources, are made up of elements that span a given social context and they influence the demand associated with various resources in the given environment (Halbesleben et al., 2014). As the value of resources are influenced by both personal and cultural elements, “the most valuable resources are those that hold both societal and personal value” (Halbesleben et al., 2014: p. 8).

Measuring Resources

Extant studies that use the conservation of resource theory have utilized five different variants of measurement in order to determine resource availability and use. The first attempt of resource measurement by Hobfoll (1988) was made up of a 74-item resource survey which relied on participants indicating the extent of gain or loss for each resource (Davidson et al., 2010). This measurement was not widely adopted due to its length, repetition, and no-relevance for a

wide range of studies (Wells et al., 1997). The second wave of resource measurement has been to select a limited set of resources (e.g., supervisor support) that is relevant for the study at hand and employ a frequently used scale for measuring the resource. This approach has been applied more frequently than the first one.

The third approach to resource measurement has been to measure the outcomes that would result in resource loss or gain and use them as, “markers that there has been a change in resources” (e.g., Lam, Huang, & Janssen, 2010; Janssen, Lam, & Huang, 2010; Halbesleben et al., 2013). The argument for the use of this measurement approach is that “the idiosyncratic nature of resources and their value ... make the selection of any specific resources questionable” (Halbesleben et al., 2014: p. 20). The fourth way that researchers have attempted to measure resources is to measure a broad set of common resources. For example, in Hochwarter et al.’s (2008) study, they used the item “I have enough equipment and personnel at my disposal to fill in for me at work” to measure a broad set of perceived resources.

The fifth way that researchers have attempted to measure resources has been to differentiate between the availability of resources and the individual value that they carry. This is because the mere availability of a resource to an individual does not provide enough information to determine whether or not that resource is valuable (Kelly et al., 2008). Therefore, Morelli & Cunningham (2012) highlight that a resources value is an important element that distinguishes whether or not a resource will be used. Other researchers have emphasized this point suggesting that researchers should, “emphasize the subjective evaluation of the value of resources when seeking to understand the impact that resources have on various outcomes” (Halbesleben et al., 2014: p.21). In sum, researchers have measured resources using a single measure, selected specific resources for measurement, measured outcomes, measured a broad selection of

resources, and by separating resource availability from resource value. As a result, there is not a single operationalization that has dominated the measurement of resources in the COR literature.

Conserving and Acquiring Resources

Two key processes, resource conservation and resource acquisition, are associated with the conservation of resource theory. The first process, resource conservation, is initiated when an individual perceives resources to be objectively lost or perceives a threat of loss. Both objective resource loss and perceived resource loss may motivate individuals to mitigate losses (Hobfoll & Freedy, 1993). For example, without continuing reciprocal resource investment in social exchanges, social support can lose value over time (Halbesleben & Wheeler, 2011). Additionally, when knowledge and skills are not applied and innovated over time, their value as resources can diminish (Bickerton, Miner, Dowson, & Griffin, 2014). Moreover, because of the negative dominance effect, the mere threat of resource loss can be more motivational than actual resource loss. Therefore, individuals who perceive a threat to resource loss or experience objective resource loss will be motivated to conserve their remaining resources (Hobfoll & Freedy, 1993).

The second process associated with the conservation of resources theory is resource acquisition (Halbesleben et al., 2014). Individuals, through resource investment, attempt to acquire resources that they believe may aid them in their goal attainment. Resources can be pursued one at a time or multiple resources can be pursued simultaneously. The pursuit of either single or multiple resources is enacted through personal strategic plans that are aimed at securing new resources (Halbesleben et al., 2014). Individuals take into consideration a variety of job and interpersonal related factors when making strategic resource investment decisions (Chiu & Tsai, 2006; Halbesleben & Bowler, 2007; Halbesleben & Wheeler, 2011; Unger, Niessen, Sonnentag,

& Neff, 2014). Additional individual factors such as age (Ng & Feldman, 2013) and personality (Halbesleben et al., 2009; Witt, Andrews, & Carlson, 2004) have also impacted resource investment decisions. Finally, social cues can impact how individuals acquire resources (Bhave, Kramer, & Glomb, 2010; Paustian-Underdahl & Halbesleben, 2014). Specifically, “the clarity with which coworkers and supervisors send signals regarding resource investment may shape the manner in which employees utilize resources to achieve goals” (Halbesleben et al., 2014: p. 14). In sum, resources can be strategically pursued individually or collectively and the decision about which resources to pursue can be influenced by idiosyncratic or socially derived factors.

Appendix H – Survey Items

Measure	Authors	Journal of Publication	Year	Item
Affective Commitment	Rhoades, Eisenberger, & Armeli	Journal of Applied Psychology	2001	I would be happy to work at my organization until I retire.
				Working at my organization has a great deal of personal meaning to me.
				I really feel that problems faced by my organization are also my problems.
				I feel personally attached to my work organization.
				I am proud to tell others I work at my organization.
				I feel a strong sense of belonging to my organization.
Job Satisfaction	Mossholder, Settoon, & Henagan	Academy of Management Journal	2005	All in all, I am satisfied with my job.
				In general, I like working here.
				I like my job better than the average worker does.
				I am satisfied with my job for the time being
Community Embeddedness	Crossley et al	Journal of Applied Psychology	2007	I simply could not leave the community that I live in.
				I feel attached to this community.
				It would be difficult for me to leave this community.
				I'm too caught up in this community to leave.
				I feel tied to this community.
				I am tightly connected to this community.
				It would be easy for me to leave this community. (R)
Organizational Embeddedness	Crossley et al	Journal of Applied Psychology	2007	I feel attached to this organization.
				It would be difficult for me to leave this organization.
				I'm too caught up in this organization to leave
				I feel tied to this organization.
				I simply could not leave the organization that I work for.

				I am tightly connected to this organization.
				It would be easy for me to leave this organization. (R)
Organizational Identification	Mael & Ashforth	Human Relations	1992	When someone criticizes my organization, it feels like a personal insult.
				I am very interested in what others think about my organization.
				When I talk about my organization, I usually say “we” rather than “they”.
				The organization’s successes are my successes
				When someone praises my organization, it feels like a personal compliment.
Perceived Organizational Support	Eisenberger et al	Journal of Applied Psychology	2002	The organization values my contribution to its well-being.
				The organization strongly considers my goals and values.
				The organization really cares about my well-being.
Spirituality Transcendence Index	Seidlitz, Abernethy, Duberstein, Evinger, Chang, & Lewis	Journal of Scientific Study of Religion	2002	My spirituality gives me a feeling of fulfillment
				I maintain an inner awareness of God's presence in my life.
				Even when I experience problems, I can find a spiritual peace within.
				I try to strengthen my relationship with God.
				Maintaining my spirituality is a priority for me.
				God helps me to rise above my immediate circumstances.
				My spirituality helps me to understand my life's purpose.
				I experience a deep communion with God.
Servant Leadership	Liden et al	Leadership Quarterly	2015	My leader can tell if something work-related is going wrong.
				My leader makes my career development a priority.
				I would seek help from my leader if I had a personal problem.

				<p>My leader emphasizes the importance of giving back to the community</p> <p>My leader puts my best interests ahead of his/her own.</p> <p>My leader gives me the freedom to handle difficult situations in the way that I feel is best.</p> <p>My leader would NOT compromise ethical principles in order to achieve success.</p>
LMX - MDM	Liden & Maslyn	Journal of Management	1998	<p>I respect my manager's knowledge of and competence on the job.</p> <p>My manager would defend me to others in the organization if I made an honest mistake.</p> <p>My manager is the kind of person one would like to have as a friend.</p> <p>I do not mind working my hardest for my manager.</p> <p>My manager would come to my defense if I were "attacked" by others.</p> <p>I like my manager very much as a person.</p> <p>I do work for my manager that goes beyond what is expected of me in my job.</p> <p>I admire my manager's professional skills.</p> <p>My manager defends (would defend) my work actions to a superior, even without complete knowledge of the issue in question.</p> <p>My manager is a lot of fun to work with.</p> <p>I am willing to apply extra efforts, beyond those normally required, to meet my manager's work goals.</p> <p>I am impressed with my manager's knowledge of his/her job.</p>
Job Performance (In-Role)	Williams & Anderson	JOM	1991	<p>Adequately completes assigned duties.</p> <p>Fulfills responsibilities specified in job description.</p>

				Performs tasks that are expected of him/her.
				Meets formal performance requirements of the job.
OCBI	Lee & Allen	Journal of Applied Psychology	2002	Willingly give your time to help others who have work-related problems.
				Adjust your work schedule to accommodate other employees' requests for time off.
				Give up time to help others who have work or non-work problems.
				Assist others with their duties.
OCBO	Lee & Allen	Journal of Applied Psychology	2002	Attend functions that are not required but that help the organizational image.
				Offer ideas to improve the functioning of the organization
				Take action to protect the organization from potential problems.
				Defend the organization when other employees criticize it.
Intent to Quit	Colarelli	Journal of Applied Psychology	1984	I frequently think of quitting my job.
				I am planning to search for a new job during the next 12 months.
				If I have my own way, I will be working for (name of bank) one year from now (R).
Social Desireability	Strahan & Gerbasi	Journal of Clinical Psychology	1972	I have never intensely disliked anyone. (T)
				I sometimes feel resentful when I don't get my way. (F)
				There have been times when I felt like rebelling against people in authority even though I knew they were right. (F)
				I am always courteous, even to people who are disagreeable. (T)
				There have been times when I was quite jealous of the good fortune of others. (F)
				I am sometimes irritated by people who ask favors of me. (F)

Perceived Supervisor Support	Rhoades et al.	JAP	2001	My supervisor cares about my opinions.
				My work supervisor really cares about my well-being.
				My supervisor strongly considers my goals and values.
				My supervisor shows very little concern for me. (R)
Neoclassical Calling	Bunderson & Thompson	Administrative Science Quarterly	2009	Working with animals feels like my calling in life.
			2009	It sometimes feels like I was destined to work with animals.
			2009	Working with animals feels like my niche in life.
			2009	I am definitely an animal person.
			2009	My passion for animals goes back to my childhood.
			2009	I was meant to work with animals.
Positive Affectivity	Iverson, Olekalns, Erwin	Journal of Vocational Behavior	1998	I usually find ways to liven up my day.
			1998	I live a very interesting life.
			1998	For me life is a great adventure.
Negative Affectivity	Iverson, Olekalns, Erwin	Journal of Vocational Behavior	1998	Minor setbacks sometimes irritate me too much.
			1998	Often I get irritated at little annoyances.
			1998	There are days when I'm "on edge" all of the time.
Control/Demographics Items				
Attention check 1	Meade & Craig	Psychological Methods	2012	Respond with 'strongly disagree' for this item
Attention check 2	Meade & Craig	Psychological Methods	2012	In your honest opinion, should we use your data?
Current Position	What is your current position at your school? (Checkbox: Teachers Aide, Teacher, Lead Teacher, Assistant Principal, Principal, Business Manager, Director, Office Support, Administration, Other)			
Time in current host location	How many months have you worked at your current school? (i.e. 4 months, 16 months, 24 months ...)			
Marital Status	What is your marital status? (Look up options for this)			
Sex	What is your sex? (Male, Female)			
Third-Culture Kid	Growing up (age 5-20), did you live in a foreign country for at least 6 consecutive months? (Yes, No, Other)			
Age	How old did you turn on your last birthday?			

Dependents	What is the number of dependents in your household (not including yourself)?
Education Level	What is the highest level of education that you have achieved? (Not including certifications) (Completed middle school, High School Diploma, Associates Degree, Bachelors Degree, Masters Degree, Specialist Degree, Doctoral Degree, Other)
Time as Expatriate	How many months have you lived as an expatriate? (Outside of your passport country)
Org. Tenure	How many months have you worked for <organization>?
Professional Tenure	How long have you been a professional educator? (Years and months)
Accompanying Family Members	How many accompanying family members are with you on the field? (Including children, spouse, relatives, etc...)
Prior International Experience	Please indicate your level of international experience. (Look up scale)
Spouse Residence	Does your spouse reside with you? (Yes, No, Not applicable)
Spouse Employment	Is your spouse employed? (Yes, No, Not applicable)
Nationality	What is your nationality?
Country of Birth	What country were you born in?
Native Language	What is your native language?
School Location	What school do you currently work for?
Age of Students Instructed	What group of students do you primarily work with at the school? (Check all that apply: Pre-K, Elementary, Middle School, Highly School, Other)

Appendix I – Analysis of the Changes in Annual Review Questions Over Time

The table below outlines the analysis of the changes in the annual review questions over time. The first column (Q#) indicates the question number from the 2019-2020 annual review. The second column (Year) indicates the year in which the question occurred. The third column (Survey Position) indicates which position in the survey the question appeared in that year. The fourth column (Question) provides the exact question given in that year’s annual review. The fifth column (Degree of Change) indicates the extent to which changes were made in the question from the previous year. Changes marked by “None” indicate that there were no changes from the previous year; “Minor” – indicates that there was a small change in the question with respect to an article, format, or wording preference, but the underlying theme of the question did not change; and “Major” – indicates that the question is fundamentally different, or the changes resulted in a substantial disruption of the underlying information collected. The sixth column (Change) describes the change that occurred from the previous year if there were any changes. The seventh column (Review) is my assessment of the changes in the question over time, and the extent to which the question can be used in for quantitative analysis based on the severity of the changes outlined.

Q #	Year	Survey Position	Question	Degree of Change	Change	Review
1	2020	1	1. I am able to keep a good balance between my personal life and professional duties.	None		This question has been included in the survey for 10 years and has undergone one minor change. The minor nature of the change has not
	2019	1	1. I am able to keep a good balance between my personal life and professional duties.	None		

	2018	1	1. I am able to keep a good balance between my personal life and professional duties.	None		influenced the underlying information obtained in any substantial way. The answers from question 1 for all 10 years can be included in the analysis.
	2017	1	1. I am able to keep a good balance between my personal life and professional duties.	None		
	2016	1	1. I am able to keep a good balance between my personal life and professional duties.	None		
	2015	1	1. I am able to keep a good balance between my personal life and professional duties.	None		
	2014	1	1. I am able to keep a good balance between my personal life and professional duties.	None		
	2013	1	1. I am able to keep a good balance between my personal life and professional duties.	Minor	Changed the position of this question from #2 in the survey to #1.	
	2012	2	2. I am able to keep a good balance between my personal life and professional duties.	None		
	2011	2	2. I am able to keep a good balance between my personal life and professional duties.	-		
2	2020	2	2. I am personally growing in my spiritual walk with the Lord.	None		This question has been included in the survey for 10 years and has undergone two minor changes. The nature of the changes has not influenced the
	2019	2	2. I am personally growing in my spiritual walk with the Lord.	None		
	2018	2	2. I am personally growing in my spiritual walk with the Lord.	None		

	2017	2	2. I am personally growing in my spiritual walk with the Lord.	None		underlying information obtained in any substantial way. The answers from question 2 for all 10 years can be included in the analysis.
	2016	2	2. I am personally growing in my spiritual walk with the Lord.	None		
	2015	2	2. I am personally growing in my spiritual walk with the Lord.	None		
	2014	2	2. I am personally growing in my spiritual walk with the Lord.	None		
	2013	2	2. I am personally growing in my spiritual walk with the Lord.	Minor	Changed the position of this question from #3 in the survey to #2.	
	2012	3	3. I am personally growing in my spiritual walk with the Lord.	Minor	Added the word "personally" to the statement.	
	2011	3	3. I am growing in my spiritual walk with the Lord.	-		
3	2020	3	3. While serving at the school, I have been able to make and maintain friendships within the NICS/Oasis community.	None		This question has been included in the survey for 10 years and has undergone three major changes. The nature of the changes has influenced the underlying information obtained in a substantial way. The answers from question 3 for 4-8 years can be included in the analysis.
	2019	3	3. While serving at the school, I have been able to make and maintain friendships within the NICS/Oasis community.	None		
	2018	3	3. While serving at the school, I have been able to make and maintain friendships within the NICS/Oasis community.	None		
	2017	3	3. While serving at the school, I have been able to make and	Major	Deleted "and/or the local community.	

		maintain friendships within the NICS/Oasis community.			
2016	3	3. While serving at the school, I have been able to make and maintain friendships within the NICS/Oasis community and/or the local community.	None		
2015	3	3. While serving at the school, I have been able to make and maintain friendships within the NICS/Oasis community and/or the local community.	Major	Removed the word "close" before "friendships"; Removed "on the field"; Added "While serving at the school"; Added "within the NICS/Oasis community and/or the local community.	
2014	3	3. I have been able to make and maintain close friendships on the field.	None		
2013	3	3. I have been able to make and maintain close friendships on the field.	Major	Added the word "make.	
2012	4	4. I have been able to maintain good, close friendships on the field.	None		
2011	4	4. I have been able to maintain good, close friendships on the field.	-		
4	2020	4. I have a great sense of fulfillment in regard to my ministry/job.	None		This question has been included in the survey for 10 years and has undergone one major and one minor change. The nature of the changes has
	2019	4. I have a great sense of fulfillment in regard to my ministry/job.	None		
	2018	4. I have a great sense of fulfillment in regard to my ministry/job.	None		

	2017	4	4. I have a great sense of fulfillment in regard to my ministry/job.	None		influenced the underlying information obtained in a substantial way. The answers from question 4 for 8 years can be included in the analysis.
	2016	4	4. I have a great sense of fulfillment in regard to my ministry/job.	None		
	2015	4	4. I have a great sense of fulfillment in regard to my ministry/job.	Minor	Added the word "ministry".	
	2014	4	4. I have a great sense of fulfillment in regard to my job.	None		
	2013	4	4. I have a great sense of fulfillment in regard to my job.	Major	Moved the question up one in the order; Removed the notion of "calling." This is a major change.	
	2012	5	5. I have a keen sense of calling in regard to my job, and therefore great fulfillment in it.	None		
	2011	5	5. I have a keen sense of calling in regard to my job, and therefore great fulfillment in it.	-		
5	2020	5	5. I feel I am doing well in adapting to the host country, culture, and the local community.	Minor	Question dropped "relating positively to the" and asks now if the participant is doing well adapting to three areas. This does not change the nature of what is being asked in a substantial way.	
	2019	5	5. I feel I am doing well in adapting to the host country/culture, and in relating positively to the local community.	None		
	2018	5	5. I feel I am doing well in adapting to the host country/culture,	None		

		and in relating positively to the local community.			
2017	5	5. I feel I am doing well in adapting to the host country/culture, and in relating positively to the local community.	Minor	Added "culture" when asking about adaption to country. ; replaced "culture and people" with "community". These changes do not change the meaning of the answers that the respondents gave.	
2016	5	5. I feel I am doing well in adapting to the host country and relate positively to the culture and people.	None		
2015	5	5. I feel I am doing well in adapting to the host country and relate positively to the culture and people.	None		
2014	5	5. I feel I am doing well in adapting to the host country and relate positively to the culture and people.	None		
2013	5	5. I feel I am doing well in adapting to the host country and relate positively to the culture and people.	Minor	Moved the question from number 6 to number 5.	
2012	6	6. I feel I am doing well in adapting to the host country and relate positively to the culture and people.	None		
2011	6	6. I feel I am doing well in adapting to the host country and relate positively to the culture and people.	-		
6	2020	6. Which of the following best	None		This question has been included in

		describes the way your local church or weekly fellowship group would speak of your involvement.			the survey for 10 years and has undergone one major and one minor change. The nature of one of the changes has influenced the underlying information obtained in a substantial way. The answers from question 6 for can be included in the analysis for 9 years.
2019	6	6. Which of the following best describes the way your local church or weekly fellowship group would speak of your involvement.	None		
2018	6	6. Which of the following best describes the way your local church or weekly fellowship group would speak of your involvement.	None		
2017	6	6. Which of the following best describes the way your local church or weekly fellowship group would speak of your involvement.	Minor	Added "or weekly fellowship group" and removed "church" at the end. Essence of the question is still the same.	
2016	6	6. Which of the following best describes the way your local church fellowship would speak of your church involvement:	None		
2015	6	6. Which of the following best describes the way your local church fellowship would speak of your church involvement:	None		
2014	6	6. Which of the following best describes the way your local church fellowship would speak of your church involvement:	None		

	2013	6	6. Which of the following best describes the way your local church fellowship would speak of your church involvement:	None		
	2012	7	7. Which of the following best describes the way your local church fellowship would speak of your church involvement: (*Have never seen him/her, *Rarely attends; Not involved at all, *Periodically attends; Somewhat involved, *Regularly attends; Actively serves the church, *Faithfully attends; Key in church leadership. High impact of church family)	Major	Added "of the following" (in reference to the answer choices" and removed "host-country pastor" and replaced with "local church fellowship"; and deleted "local" in front of church at the end. I believe these changes might have an impact on the underlying information being assessed.	
	2011	7	7. Which best describes the way your host-country pastor would speak of your local church involvement:	-		
7	2020	7	7. The salary and benefits provided by my school along with the support I have already raised affords me the ability to live here without needing to raise additional support.	None		This question has been included in the survey for 10 years and has undergone three major changes. The nature of the changes has influenced the underlying information obtained in a substantial way. Depending upon the construct of interest, the
	2019	7	7. The salary and benefits provided by my school along with the support I have already raised affords me the ability to live here without needing to	None		

		raise additional support.			answers from question 7 can be included for 6 -10 years in the analysis.
2018	7	7. The salary and benefits provided by my school along with the support I have already raised affords me the ability to live here without needing to raise additional support.	None		
2017	7	7. The salary and benefits provided by my school along with the support I have already raised affords me the ability to live here without needing to raise additional support.	Major	Added another source of resource acquisition (personally raised support), and asks if it affords the ability to live in the host country.	
2016	7	7. The salary/stipend and benefits provided by my school allow me to live here comfortably without needing to raise support.	None		
2015	7	7. The salary/stipend and benefits provided by my school allow me to live here comfortably without needing to raise support.	Major	Previous question asks if the financial support allows employees to live on the local economy; new question asks about employee's comfort level. Changes the nature of the underlying information.	
2014	7	7. The salary/stipend and benefits provided by my school are reasonable for living on the local economy.	None		
2013	7	7. The salary/stipend and benefits provided	None		

		by my school are reasonable for living on the local economy.			
2012	8	8. The salary/stipend and benefits provided by my school are reasonable for living on the local economy.	Major	Changed from "sufficient" to "reasonable." Sufficient infers some type of objective assessment, while reasonableness is a subjective assessment.	
2011	8	8. The salary/stipend and benefits provided by my school are sufficient for living on the local economy.	-		
8	2020	8. Students' lives at this school are being greatly influenced for Christ's Kingdom.	None		This question has been included in the survey for 10 years and has undergone one minor change. The minor nature of the changes has not influenced the underlying information obtained in a substantial way. The answers from question 8 for all 10 years can be included in the analysis.
	2019	8. Students' lives at this school are being greatly influenced for Christ's Kingdom.	None		
	2018	8. Students' lives at this school are being greatly influenced for Christ's Kingdom.	None		
	2017	8. Students' lives at this school are being greatly influenced for Christ's Kingdom.	None		
	2016	8. Students' lives at this school are being greatly influenced for Christ's Kingdom.	None		
	2015	8. Students' lives at this school are being greatly influenced for Christ's Kingdom.	None		
	2014	8. Students' lives at this school are being greatly	None		

		influenced for Christ's Kingdom.			
2013	8	8. Students' lives at this school are being greatly influenced for Christ's Kingdom.	None		
2012	9	9. Students' lives at this school are being greatly influenced for Christ's Kingdom.	Minor	Changed the order in which the question appeared to participants.	
2011	10	Students' lives at this school are being greatly influenced for Christ's Kingdom.	-		
9	2020	9. The school operates at a high degree of educational professionalism.	None		This question has been included in the survey for 10 years and has undergone two minor changes. The nature of the changes have not influenced the underlying information obtained in any substantial way. The answers from question 9 for all 10 years can be included in the analysis.
	2019	9. The school operates at a high degree of educational professionalism.	None		
	2018	9. The school operates at a high degree of educational professionalism.	None		
	2017	9. The school operates at a high degree of educational professionalism.	None		
	2016	9. The school operates at a high degree of educational professionalism.	None		
	2015	9. The school operates at a high degree of educational professionalism.	None		
	2014	9. The school operates at a high degree of educational professionalism.	None		

	2013	9	9. The school operates at a high degree of educational professionalism.	Minor	Changed the order in which the question appeared to participants.	
	2012	10	10. The school operates at a high degree of educational professionalism.	Minor	Changed the order in which the question appeared to participants.	
	2011	11	The school operates at a high degree of educational professionalism.	-		
10	2020	10	10. Overall, the faculty at our school displays spiritual maturity.	None		This question has been included in the survey for 10 years and has undergone four minor changes. The nature of the minor changes has not influenced the underlying information obtained in a substantial way. The answers from question 10 for all 10 years can be included in the analysis.
	2019	10	10. Overall, the faculty at our school displays spiritual maturity.	None		
	2018	10	10. Overall, the faculty at our school displays spiritual maturity.	None		
	2017	10	10. Overall, the faculty at our school displays spiritual maturity.	None		
	2016	10	10. Overall, the faculty at our school displays spiritual maturity.	Minor	Removed the word "strong" from the statement. This does not change the underlying information assessed in the question since "strong" as a subjective comparative term was not defined in previous questions.	
	2015	10	10. Overall, the faculty at our school displays strong spiritual maturity.	Minor	Changed the object of the statement from "my NICS/Oasis team" to "the faculty at our school". This change is not significant because those two groups are	

				not very different at each school.		
	2014	10	10. Overall, my NICS/Oasis team displays strong spiritual maturity.	None		
	2013	10	10. Overall, my NICS/Oasis team displays strong spiritual maturity.	Minor	Changed the order in which the question appeared to participants.	
	2012	11	11. Overall, my NICS/Oasis team displays strong spiritual maturity.	Minor	Changed the order in which the question appeared to participants.	
	2011	12	Overall, my NICS/Oasis team displays strong spiritual maturity.	-		
11	2020	11	11. I feel supported by the Member Care team when a need arises.	None	This question has been included in the survey for 10 years and has undergone two minor and two major changes. The nature of the changes has influenced the underlying information obtained in a substantial way. Depending upon the construct of interest, the answers from question 11 can be included for 2 - 7 years in the analysis.	
	2019	11	11. I feel supported by the Member Care team when a need arises.	Major		Shifts the focal point from the staff as a whole to the individual level.
	2018	11	11. The Member Care team at my school is an encouragement to our staff.	None		
	2017	11	11. The Member Care team at my school is an encouragement to our staff.	Minor		Shifts the reference from the system to a team. This still assesses how the organization encourages its employees.
	2016	11	11. The Member Care system at my school is an encouragement to our staff.	None		
	2015	11	11. The Member Care system at my school is	None		

			an encouragement to our staff.			
	2014	11	11. The Member Care system at my school is an encouragement to our staff.	None		
	2013	11	11. The Member Care system at my school is an encouragement to our staff.	Minor	Changed the order in which the question appeared to participants.	
	2012	12	12. The Member Care system at my school is an encouragement to our staff.	Major	The original question assesses community building, this version assesses encouragement. Also changed the order in which this question appeared.	
	2011	13	12. The Member Care system at my school helps build community among our staff.	-		
12	2020	12	12. Being a member of the NICS/Oasis network is clearly important and evident at our school and reflected by our leadership team.	Major	Added "and reflected by our leadership team" to the end of the prompt. This change introduces another element (leadership team) into the question. However, it still assesses the underlying theme as the previous questions.	This question has been included in the survey for 10 years and has undergone one major and four minor changes. The nature of the changes has not influenced the underlying information obtained in a substantial way. The answers from question 12 for all 10 years can be included in the analysis.
	2019	12	12. Being a member of the NICS/Oasis network is clearly important and evident at our school.	None		
	2018	12	12. Being a member of the NICS/Oasis network is clearly	Minor	Changed "part" to "member." Unerlying meaning is still the same.	

		important and evident at our school.			
	2017	12	12. Being a part of the NICS/Oasis network is clearly important and evident at our school.	None	
	2016	12	12. Being a part of the NICS/Oasis network is clearly important and evident at our school.	None	
	2015	12	12. Being a part of the NICS/Oasis network is clearly important and evident at our school.	Minor	Changed the word "movement" to "network" resulting in increased clarity.
	2014	12	12. Being a part of the NICS/Oasis movement is clearly important and evident at our school.	None	
	2013	12	12. Being a part of the NICS/Oasis movement is clearly important and evident at our school.	Minor	Changed the order in which the question appeared to participants.
	2012	13	13. Being a part of the NICS/Oasis movement is clearly important and evident at our school.	Minor	Removed "integral" from the statement and added "evident." The responses to this form of the question still assess the underlying meaning. Changed the order in which the question appeared to participants.
	2011	18	Being an integral part of NICS/Oasis is clearly important to our school.	-	
13	2020	13	13. For the Gospel of Christ, to the greatest extent possible in your country, we as a school and individuals in our school influence host country nationals	None	This question has been included in the survey for 10 years and has undergone one major and four minor changes.

		outside the school community.			The nature of one of the changes has influenced the underlying information obtained in a substantial way. The answers from question 13 for 9 years can be included in the analysis.
2019	13	13. For the Gospel of Christ, to the greatest extent possible in your country, we as a school and individuals in our school influence host country nationals outside the school community.	None		
2018	13	13. For the Gospel of Christ, to the greatest extent possible in your country, we as a school and individuals in our school influence host country nationals outside the school community.	None		
2017	13	13. For the Gospel of Christ, to the greatest extent possible in your country, we as a school and individuals in our school influence host country nationals outside the school community.	Minor	Adds "individuals" to the prompt, but the underlying assessment carries the same meaning.	
2016	13	13. For the Gospel of Christ, to the greatest extent possible in your country, our school influences host country nationals outside the school community.	None		
2015	13	13. For the Gospel of Christ, to the greatest extent possible in your country, our school influences host country nationals outside the school community.	Minor	Adds "to the greatest extent possible in your country" as a qualifier to the statement as some schools operate in areas where they are not able to have the same level of impact	

				on the community as other subsidiaries.
2014	13	13. Our school influences host country nationals outside the school community for the Gospel of Christ.	Minor	Adds "outside the school community" to the question. This change has narrowed the context of the question, but still reflects the underlying meaning.
2013	13	13. Our school influences host country nationals for the Gospel of Christ.	Minor	Changed the order in which the question appeared to participants.
2012	14	14. Our school influences host country nationals for the Gospel of Christ.	Major	Changes reference point from individual to group and no longer assesses an emotion. The meaning of the question is fundamentally different. Changed the order in which the question appeared to participants.
2011	19	19. I am excited about what NICS/Oasis is doing beyond our school.	-	

Appendix J - Qualitative Interview Protocol

NICS/Oasis Retention Protocol	
Biographical Data:	
1	What is your name?
2	What is your age?
3	What is your gender?
4	What is your position with NICS?
5	How long have you been in that position?
6	How long have you been with NICS?
7	How long have you lived overseas as an expatriate?
8	In your time with NICS/Oasis, have you been responsible for recruiting, nurturing, placing, or managing expatriates that work overseas?
General Information	
9	How does the organization attract experienced teachers to work overseas?
10	As opposed to new teachers, what are some of the characteristics that experienced teachers at NICS possess? Do these differences impact any of the schools policies/procedures/programs?
11	What factors do experienced teachers require that new teachers do not in order to continue working in the organization?
12	Why do experienced teachers stay employed at their schools? Why do they leave?
13	How is the turnover of inexperienced teachers different or the same as the turnover of experienced teachers?
RQ1: How does professional tenure (i.e. occupational embeddedness) of SIEs impact retention at the subsidiary/unit level in multinational organizations?	
14	How does NICS/Oasis view teachers that are embedded within their schools?
15	How does a teacher become embedded within their school?
16	Organizational Embeddedness What drives teachers to become embedded in the school?
17	How does the loss of a teacher that is embedded in the school impact the school?
18	What organizational support, in the form of policies/procedures/programs, is offered in order to promote teacher organizational embeddedness?

19		What does it take in order for a teacher to "fit" in well with their school?
20		What social connections do teachers need to make in order to be successful in their school?
21		When embedded teachers leave their schools what do they give up?
22		How would you describe the climate related to employee embeddedness at the school/network?
23		How does NICS/Oasis view teachers that are embedded within their occupation?
24		How does a teacher become embedded within their occupation?
25		What drives teachers to become embedded in their occupation?
26		How does the loss of a teacher that is embedded in their profession impact the school?
27	Occupational Embeddedness	What organizational support, in the form of policies/procedures/programs, is offered in order to promote teacher occupational embeddedness?
28		What does it take in order for a teacher to "fit" in well within their occupational community?
29		What social connections do teachers need to make in order to be successful in their occupation?
30		When occupationally embedded teachers leave their profession, what do they give up?
31		How would you describe the climate related to employee occupational embeddedness?
RQ2: How does adjustment affect the embeddedness and retention of SIEs?		
32		Can you tell me about your observations of the adjustment of professional teachers in the organization?
33		In what areas do teachers that are new to NICS/Oasis have to adjust when they arrive in a cross-cultural environment?
34		In what ways might experienced and new teachers adjust differently?
35		How might an experienced teacher's adjustment impact their ability to become embedded in the school?
36		How might an experienced teacher's adjustment impact their retention in the school?
37		What types of adjustments do experienced teachers need to make in order to be comfortable in their new school?

38	What types of adjustments do experienced teachers need to make in order to be comfortable in their new cross-cultural environment?
39	What types of adjustments do experienced teachers need to make in order to be comfortable with social interactions in their new environment?
40	How would you describe the climate related to employee cross-cultural adjustment?
RQ:3 What policies/systems can multinational organizations put in place to increase the retention of SIEs by way of embeddedness and adjustment promotion?	
41	At the school level, what policies/procedures/initiatives are put in place to encourage teachers to continue their occupational/professional embeddedness?
42	What can schools do to facilitate social connections that allow experienced teachers to feel embedded in the school? (Links)
43	What can schools do to create an environment where experienced teachers feel that they belong at the school? (Fit)
44	What can schools do to create an environment where experienced teachers will feel like they are giving something up if they leave the school? (Sacrifice)
45	At the school level, what policies/procedures/initiatives are put in place to encourage teachers to adjust to their new environment?
46	At the school level, what policies/procedures/initiatives are put in place to encourage experienced teachers to remain employed at the school?
47	At the network level, what policies/procedures/initiatives are put in place to encourage experienced teachers to remain employed in the network?
48	The researcher anticipates the use of additional follow-up and clarification questions to be administered throughout the course of the interviews.

VITA

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Education

- Ph.D. University of Mississippi (Expected August 2021)
Major: Business Administration - Management
- Ed.S. Liberty University (2017)
Major: Education - Educational Leadership
- MBA University of Mississippi (2010)
Major: Business
- B.S. University of Southern Mississippi (2009)
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Research Interests

I am interested in the individual psychological and behavioral aspects of human resource management in organizations, specifically in relation to the following areas:

- Self-initiated Expatriates
- Servant & Generative Leadership
- Management History

My dissertation “*Turnover of self-initiated expatriates: the role of servant leadership and organizational embeddedness*,” co-chaired by Dr. Milorad Novicevic and Dr. Paul Johnson, examines how embeddedness mediates the relationship between servant leadership and turnover among self-initiated expatriates.

Journal Articles (Peer-reviewed)

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Lugar, C. W., Holland, J., & Novicevic, M. M. (2018) "Missionaries and internationalization of education: The generative and collective leadership of Joe Hale and Dennis Lugar." *Missionaries and their Role in Society*. Nova Science Publishers, Inc. Hauppauge, NY: 43-56.

Moring, C., **Lugar, C. W.**, Holland, J., Novicevic, M. M., Hoang, H., Cartwright, G., Johnsey, L. (TBD) "Exploring the margins of institutional healthcare: A collaborative autoethnography through the lens of institutional work and institutional entrepreneurship." In Mills, A. J., (2021) *History and Business Storytelling*. (Invited manuscript).

Refereed Presentations

Diaz, C., & **Lugar, C. W.** (2020). Are investors concerned about racist company owners and employees? Abstract accepted for presentation in November 2020 at *Decision Science Institute Annual Conference*.

Williamson, P. M., Marshall, D. R., Novicevic, M. M., Mills, A. J., & **Lugar, C. W.** (2019). Performing intersection identity work over time: Historic case of Viola Turner. In *Academy of Management Proceedings* (Vol. 2019, No. 1, p. 12212). Briarcliff Manor, NY 10510: Academy of Management.

Lugar, C. W., Garrett-Scott, S., Novicevic, M. M., Popoola, I. T., Humphreys, J. H., & Mills, A. J. (2019). The historic emergence of intersectional leadership: Maggie Lena Walker and the Independent Order of St. Luke. Paper presented at the annual meeting of the *Academy of Management*, Boston, MA.

Meuser, J.D., & **Lugar, C.W.** (2019). Character in Context: A Proposed Framework. Paper presented at the annual meeting of the *Western Academy of Management*, Rohnert Park, California.

Working Papers

Lugar, C. W. (2020). *Turnover of self-initiated expatriates: the role of servant leadership and organizational embeddedness*.

Lugar, C.W. (2020). *What we know about self-initiated expatriates: Systematic review, synthesized model, and theoretical development.*

Lugar, C.W. (2020). *Self-initiated expatriate embeddedness and retention: An organizational level analysis over time.*

Lugar, C. W. (2020). *To stay or go again: Motivations for self-initiated re-expatriation.*

Diaz, C., Popoola, T., Novicevic, M. M., & **Lugar, C. W.** (2020). *Approach-avoidance theory of student self (un)accountability: implications for student perceived stress.*

Popoola, T., **Lugar, C. W.**, Diaz, C., & Novicevic, M. M. (2019). *The case for Leon: Claire Collins Harvey.*

Meuser, J.D., & **Lugar, C.W.** (2018). *Character in Context: A Proposed Framework.*

Teaching Experience

University of Mississippi (2017 - 2021)

Instructor of Record:

- Organizational Behavior (2018): MGMT 391 - (Evaluation not Administered)
- Compensation Management (2018): MGMT 494 - (4.21 - Dept. Average 4.15)
- Compensation Management (2020): MGMT 494 - (Not yet reported)
- Compensation Management (2021): MGMT 494 (To Be Instructed)

Facilitation/Teaching Assistant

- International Business: BUS 321
- Entrepreneurship and Management: GB 370
- Principles of Management: MGMT 371
- Organizational Behavior: MGMT 391
- Management of Strategic Planning: MGMT 493
- Leadership and Ethics: MBA 601

Network of International Christian Schools (NICS) - Brasilia International School (2014-2015)

High School Teacher

- British Literature- Juniors & Seniors (Fall, 2014)
- Civics - Juniors & Seniors (Fall, 2014)
- Economics - Juniors & Seniors (Spring, 2015)

Ad Hoc Reviewer

Journal of Managerial Psychology (2020)

Conference Reviewer

Academy of Management Annual Conference
Southern Management Association Annual Conference

Professional Affiliations & Service

Member: Academy of Management
Member: Southern Management Association
Program Assistant: Excellence in Servant Leadership Program

Grants/Awards

University of Mississippi Excellence in Community Engagement Awards: 2020 Finalist for Community-Engaged Service, “LeadershipServ's™: Excellence in Servant Leadership Program,” May, 2020, **\$1000 rewarded.**

University of Mississippi in written and oral communication: 2020 grant recipient for incorporating written and oral communication in lectures, August, 2020, **\$500 rewarded.**

Certifications/Professional Development

- Incorporating student communication in lectures workshop (2020)
- Online Teaching Endorsement - successfully completed Academic Outreach’s eLearning Endorsement Program (June 2020).
- **Graduate Minor in Applied Statistics (GMAS) (2019).**
- Introduction to Mediation, Moderation, and Conditional Process Analysis (October, 2018). Workshop presented by Andrew F. Hayes.
- Human Resource Certificate - University of Mississippi (2010)

Work Experience & Responsibilities

Employee at The Printing Company (Olive Branch, MS, USA): 2004-2006

- I worked on an assembly line as part of a team that both executed unique projects and designed innovative processes to improve efficiency.

General Manager at Chaila Coffee Shop (Kabul, Afghanistan): 2007

- I was responsible for hiring, firing, training, developing procedural processes, product development, resource procurement, financial accounting and management of day-to-day operations.

General Manager of Business Development with Flatworld Solutions (USA, India, Brazil, Columbia, Peru, China, Philippines): 2010-2012

- I worked as the lead project and account manager for a software platform that was used with the World Trade Center Association where I had responsibilities involving customer relations, product development, software testing, and customer training.
- I was assigned to a new project where I helped develop process manuals in the US REO industry and I moved to the Philippines to implement, train, and manage a data entry center.

Owner of GoWaiter franchise (Southaven, MS): 2012-2014

- I owned and operated the GoWaiter franchise in Southaven in which my responsibilities included: restaurant and customer relations, equipment procurement, inventory management, employee and independent contractor oversight, accounting and payroll management, marketing and advertising activities, and all other responsibilities that go with owning a small business.

Finance Director at Brasilia International School (Brasilia, Brazil): January 2014 - June 2015

- I managed the financial operations of a private international christian school. Duties included: procurement, work order follow up, managing payables, invoicing parents, reviewing contracts, marketing with local businesses and embassies, event planning and coordination, cafeteria oversight, etc... I was also able to teach British Literature, Civics, and Economics classes to juniors and seniors from 7 countries around the globe.

Business Manager at American International School (Accra, Ghana): July 2015 - 2017

- I managed the daily non-academic operations of a private international christian school in Accra, Ghana. My duties at AIS included: visa paperwork processing, vendor relations, tax filing, book reconciliations, housing management, vehicle management, parent correspondence, invoicing, budgeting, tuition pricing, etc...