

# **International Relocation Mobility Readiness**

**An Analysis of its Antecedents and Development of a Theory**

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October 2018



*To my family*



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## List of Abbreviations

AE	Assigned expatriate
CFI	Comparative fit index
CMB	Common method bias
CMIN/DF	Normed chi-square
DE	Drawn expatriate
df	Degrees of freedom
HR	Human resource
HRM	Human resource management
IBT	International business traveler
IJHRM	International Journal of Human Resource Management
Inter-SIE	inter-organizational self-initiated expatriate
Intra-SIE	intra-organizational self-initiated expatriate
IRM	International relocation mobility
IRMR	International relocation mobility readiness
ISI	Institute for Scientific Information
JGM	Journal of Global Mobility
M	Mean
MGB	Model of goal-oriented behavior
MNCs	Multinational companies
MNEs	Multinational enterprises
n.s.	not significant
OECD	Organisation for Economic Co-operation and Development
RMSEA	Root mean squared error approximation
ROI	Return on investment
SD	Standard deviation
SEM	Structural equation modeling
SIE	Self-initiated expatriate
SSCI	Social Sciences Citation Index
TLI	Tucker-Lewis index

TPB	Theory of planned behavior
VHB	Verband der Hochschullehrer für Betriebswirtschaft e.V.
UN	United Nations

# 1 Synopsis

## 1.1 Introduction

In today's global economy, multinational corporations (MNCs) increasingly need to transfer employees worldwide (Armstrong & Li, 2017; Firth, Chen, Kirkman, & Kim, 2014). Although being more cost intensive than alternative forms of international mobility (e.g. business travels or commuter assignments), 81% of MNCs worldwide expect long-term assignment activity to stay the same or increase within the next two years. Company's goals such as filling leadership positions abroad or starting up new business operations can be best accomplished by long-term international assignments (CARTUS, 2016). Stimulating knowledge transfer as well as aligning control and coordination with the corporate culture are further reasons for sending expatriates to foreign subsidiaries of a company (de Eccher & Duarte, 2016; Dickmann, Doherty, Mills, & Brewster, 2008). A major challenge for MNCs is the attraction and selection of expatriate candidates. It is thus surprising that MNCs worldwide seldom apply formal procedures to select candidates for international postings (Brookfield GMAC, 2016). And even if a formal selection process exists, it is often based on candidates' technical skills (Tungli & Peiperl, 2009). However, prerequisites for a successful expatriation are not only the technical or intercultural abilities (e.g. Templer, 2010) and the opportunities for international assignments (e.g. Cerdin & Le Pargneux, 2009), but also the motivation to relocate abroad (cf. Appelbaum, Bailey, Berg, & Kalleberg, 2000).

Nearly 61% of MNCs worldwide communicate to their employees that international mobility is a necessary precondition for career advancement and obtaining specific leadership positions. This increases the pressure on the employees to accept an international assignment offer, although they may actually not be willing to relocate abroad, e.g. because of family-related concerns (e.g. Cole & Nesbeth, 2014). Sending employees, who are not motivated to relocate abroad, on international assignments can cause cultural adjustment problems, less job satisfaction and a premature termination of the assignment (Pinto, Cabral-Cardoso, & Werther, 2012). In addition to high organizational costs (Vögel, Van Vuuren, & Millard, 2008), failure in the expatriation process often also results in high psychological

costs for the expatriate (e.g. loss of self-confidence; Kassar, Rouhana, & Lythreatis, 2015). Problems in the expatriate selection processes, among other factors, have been identified as one of the main reasons for expatriate failure (cf. Brookfield GMAC, 2016; Yeaton & Hall, 2008). Consequently, companies could reduce expatriate failure rates by applying formal procedures to select those expatriates that exhibit a high motivation to relocate abroad (*international relocation mobility readiness, IRMR*). Moreover, knowledge about cause-effect relations that lead to high IRMR can be a distinct advantage for MNCs worldwide. This knowledge helps to optimally manage employees' IRMR by applying specific measures at the best possible time (e.g. by timely providing professional support for the trailing spouse; McNulty, 2012).

This thesis focuses on the international relocation mobility readiness construct and sheds light to two important fields of research in this context. First, IRMR is defined, conceptualized and measured heterogeneously by scientific research. This lack of clarity and consistency complicates the interpretation and comparability of IRMR research results (cf. Remhof, Gunkel, & Schlaegel, 2014). While the business literature focuses on employees' *willingness to accept an international assignment* (e.g. Kim & Froese, 2012), sociologists investigate the *migration intention* of large populations (e.g. Kley, 2011) and the psychological discipline is interested in employees' or students' *willingness to relocate abroad* (e.g. Wagner & Westaby, 2009). According to Remhof et al. (2014) "researchers should take care not to treat willingness and intention as if they were the same construct given that the different operationalizations might result in differing explanations and predictions" (p. 2322). While 'intentions' reflect individuals' *concrete plans* to engage in a specific kind of goal-oriented behavior (e.g. international relocation) in a specific time frame (Ajzen, 1991; Perugini & Bagozzi, 2004), 'willingness' can be defined as individuals' anticipation of how they *would* react if confronted with the opportunity to perform a specific behavior (e.g. international assignment offer) (Pomery, Gibbons, Reis-Bergan, & Gerrard, 2009). Although both constructs overlap, they have different implications for the meaning of IRMR and hence must be distinguished clearly.

A clear distinction between these concepts should also be reflected in the measurement of the IRMR construct (cf. Remhof et al., 2014). The decision to relocate abroad is complex and influenced by a broad range of influencing factors (Dickmann et al.,

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2008). This complexity should also be considered in IRMR measurements. However, many IRMR studies apply measures that assess different constructs (e.g. willingness and intention) in the same scale (Mol, Born, Willemsen, van der Molen, & Derous, 2009; Tharenou, 2008). This is problematic for the interpretation of IRMR research results, as the different psychological constructs differ strongly (cf. Remhof et al., 2014). Additionally, many IRMR scales measure the willingness to relocate abroad for a specific reason (e.g. Brett & Stroh, 1995; Landau, Shamir, & Arthur, 1992), while ignoring other important pull factors such as location attractiveness or professional development (e.g. Dickmann, 2012). All in all, there is a lack of clarity and consistency regarding the definition, conceptualization and measurement of IRMR. Hence, the **first research goal of this thesis** is to provide a clear definition and conceptualization of the IRMR construct and to give recommendations regarding its measurement. Thus, we aim to improve the interpretation and comparability of IRMR research results.

Second, several authors from different scientific disciplines are interested in the question which individual, social, organizational, job- and career-related as well as location-specific factors influence employees' decision to relocate internationally (Dickmann et al., 2008; Konopaske, Robie, & Ivancevich, 2009; Mol et al., 2009). Most of these studies follow the positivist school of research and conduct empirical tests regarding the influence of individual and often 'objective' factors (e.g. demographics) on IRMR (e.g. Landau et al., 1992; Mignonac, 2008). The results of this stream of research are rather mixed (cf. Otto & Dalbert, 2010) and difficult to compare because of the different definitions, conceptualizations and measurements of the IRMR construct (cf. *first research goal of this thesis*). For instance, de Eccher and Duarte (2016) show that men are more willing to accept an international assignment than women, while Otto and Dalbert (2012) find no significant gender effects. Only few studies deal with the influence of personality traits (e.g. Mol et al., 2009; Otto & Dalbert, 2012) or location characteristics (e.g. Dickmann, 2012; Lowe, Downes, & Kroeck, 1999) on employees' international relocation decisions. However, personality traits often explain more variance in IRMR than demographics (cf. Otto & Dalbert, 2012). Moreover, recent results highlight the importance of employees' perception of specific location characteristics (e.g. safety level) for employees' IRMR (de Eccher & Duarte, 2016). While some studies already focus on the impact of the expatriate's family

(especially partner) on international relocation decisions (e.g. Konopaske et al., 2005; Tharenou, 2008), only few studies investigate the mechanisms that explain how these social factors (e.g. partner's support) influence employees' IRMR (e.g. van der Velde, Jansen, Bal, & van Erp, 2017). Since family concerns are among the most common reasons for rejecting international moves (Brookfield GMAC, 2016; Cole & Nesbeth, 2014), MNCs would highly benefit from knowledge about the way in which family-related variables influence employees' IRMR. However, we still lack a comprehensive theoretical framework that shows how the different factors interrelate and affect employees' IRMR. To date, no theory exist that fully explains an employee's decision-making process regarding *international relocation mobility (IRM)* and shows in which particular decision phases the different influencing factors become evident. Hence, the **second research goal of this thesis** is to provide a comprehensive picture regarding the cause-effect relations that lead to IRMR and IRM behavior.

This is the starting-point for the present thesis. It deals with definitions and explanations for employees' IRMR by considering multi-level influencing factors (e.g. individual and organizational antecedents) and by approaching different research angles. The remaining chapter is structured as follows. In section 1.2 we provide a brief overview of the different research paradigms and approaches which are applied in this thesis. Section 1.3 discusses the main ideas, research strategies and contributions of the manuscripts underlying this thesis. In section 1.4 we discuss theoretical and practical implications of this thesis and points to fields for future research. Finally, section 1.5 concludes.

## **1.2 Research paradigms and approaches**

The manuscripts of this thesis underlie different research paradigms and apply various approaches to data analysis. Thus, we will give a brief overview of these paradigms and methods of data analysis here.

In general, scientific paradigms can be defined as a "set of interrelated assumptions about the social world which provides a philosophical and conceptual framework for the organized study of that world" (Filstead, 1979, p. 34). The researcher is guided by this

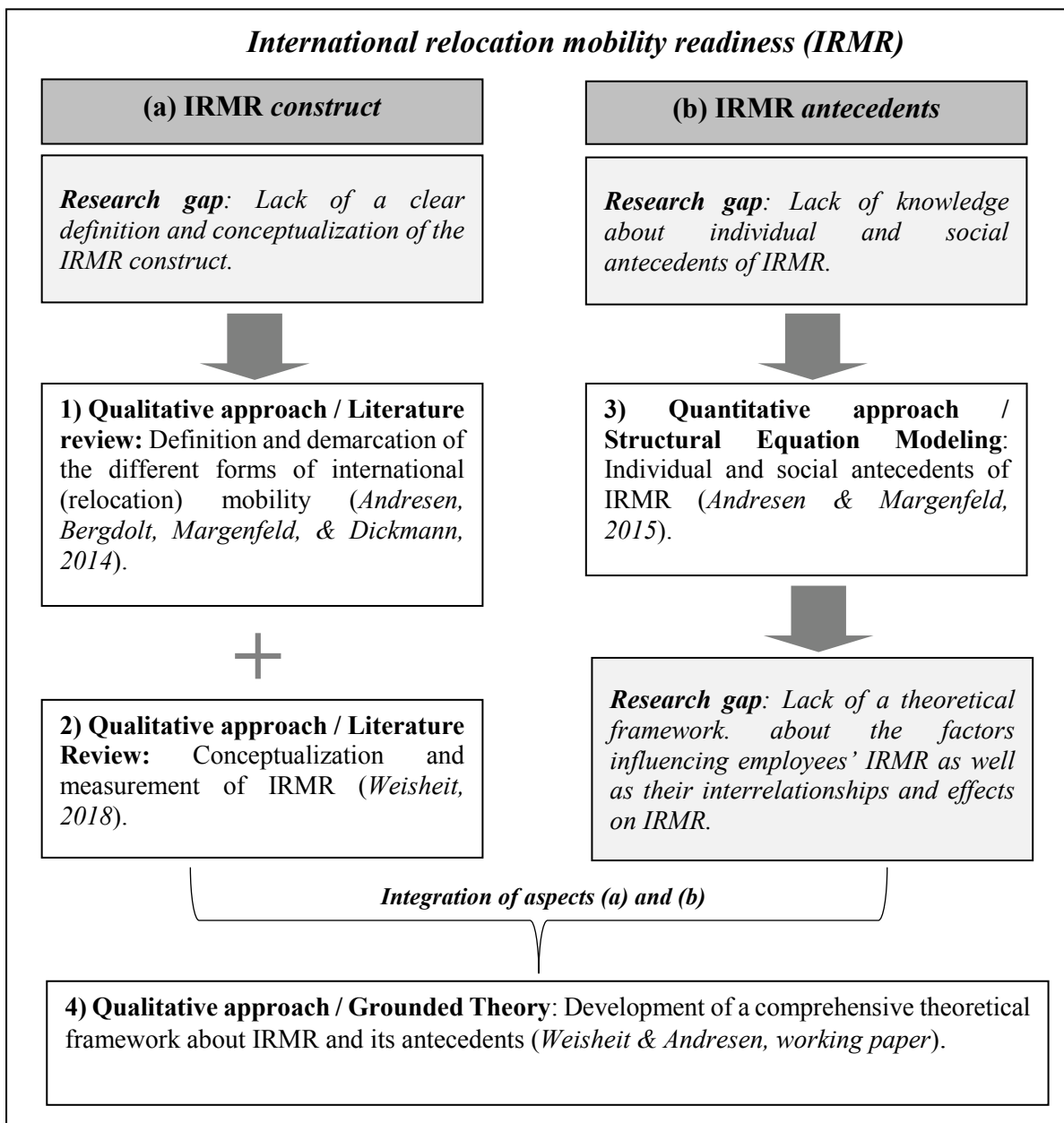
paradigm in his or her assumptions about research and the selection of methods used in the study (cf. Ponterotto, 2005). Positivist and postpositivist paradigms both assume the existence of an objective reality, i.e. knowledge which is independent from the researcher. Due to the limits of human cognition, postpositivists also admit that this objective reality is not fully apprehendable (Lincoln & Guba, 2000). Quantitative research such as the hypothetico-deductive method chiefly follows the positivist and postpositivist paradigms (Cacioppo, Semin, & Berntson, 2004). By contrast, constructivism assumes that several apprehendable and equally valid realities exist which are constructed by individuals (i.e. researchers and research participants). Hence, knowledge or deeper meaning is jointly created by the interaction between researchers and participants. Qualitative research is often grounded on the constructivist approach (Charmaz, 2006; Ponterotto, 2005).

Another distinction must be made between inductive versus deductive approaches to data analysis. Inductive analysis “refers to approaches that primarily use detailed readings of raw data to derive concepts, themes, or a model through interpretations made from the raw data by an evaluator or researcher.” (Thomas, 2006, p. 238). The inductive approach is used in several types of qualitative data analyses, especially grounded theory (Glaser & Strauss, 1967). Contrarily, the empirical test (i.e. falsification) of hypotheses or assumptions which have been deduced from theory or literature is typical for the deductive approach (cf. Thomas, 2006). In the following, we will show how the four manuscripts interrelate and highlight the underlying research paradigms and approaches to data analysis.

### **1.3 Addressed questions, applied research strategies and contributions**

Based on our two research goals, this thesis focuses on (a) the definition, conceptualization and measurement of the IRMR construct and (b) the antecedents of IRMR. These fields of research are addressed by four separate manuscripts. Each manuscript has a specific focus, ties ends to several research directions, and contributes to the resolution of the two research goals derived above (cf. section 1.1). This is highlighted in Figure 1. It shows the contextual and methodological focus of the manuscripts. The figure emphasizes that the manuscripts do not stand alone, but rather build on one another and interrelate.





**Figure 1: Integration of the four manuscripts**

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More specially, this thesis includes the following four manuscripts:

1. 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. *The International Journal of Human Resource Management*, 25(16), 2295-2318.
2. Weisheit, J. (submitted). Should I stay or should I go? A systematic literature review about the conceptualization and measurement of international relocation mobility readiness. *Journal of Global Mobility*.
3. Andresen, M., & Margenfeld, J. (2015). International relocation mobility readiness and its antecedents. *Journal of Managerial Psychology*, 30(3), 234–249.
4. Weisheit, J., & Andresen, M. (working paper). Employees' international relocation mobility readiness and its antecedents: A theoretical framework.

Following the first research goal of this thesis, two manuscripts focus on the definition, conceptualization and measurement of IRMR. Existing definitions of IRMR often remain unclear regarding important aspects of the construct such as the kind of international mobility. For instance, Froese, Jommersbach and Klautzsch (2013) define 'expatriation willingness' as "the likelihood of an employee accepting a job offer, which requires living and working in a foreign country" (p. 3248). The terms 'living and working' imply that IRMR focuses on work-related international mobility. However, different forms of work-related international mobility exist, such as international business travels or long-term assignments, which are related to different challenges for the individual (cf. Tharenou, 2015). We still lack clarity regarding the forms of international work-related mobility subsumed by IRMR.

The overarching goal of the **first manuscript** is to sharpen our understanding of the first important component of the IRMR construct: *international relocation mobility*. More specifically, the criteria for a demarcation of the terms migrant, assigned expatriate (AE), and self-initiated expatriate (SIE) are unclear, leading to a lack of comparability of research

(Baruch, Dickmann, Altman, & Bournois, 2013). To generate a new conceptualizing framework, which plainly distinguishes between these three terms, we applied a *qualitative approach*. We conducted a systematic literature research, screening articles in English language, published in peer-reviewed journals from three scientific disciplines (business, psychology and sociology) for a definition of the terms. To systematically analyze our data, we applied qualitative content analysis (Mayring, 2000). Coding categories were drawn from standard business and sociological textbooks (*deductive approach*) as well as from the data itself (*inductive approach*). We also considered the Rubicon model of action phases (Heckhausen & Gollwitzer, 1987) to clearly define the criterion ‘initiative’. Finally, we arrive at seven criteria which plainly distinguish between the terms migrant, AE and SIE. Based on these criteria, we provide a clear and unique definition of each of the three terms. Moreover, we conclude that IRM covers different forms of ‘expatriates’ (i.e. AEs and SIEs), who move to another country while changing the dominant place of residence and execute work abroad. However, our understanding of IRM excludes kinds of international work-related mobility that do not involve a relocation abroad such as commuter assignments or international business travels (e.g. Collings, Scullion, & Morley, 2007).

The results of our first manuscript are crucial for both HR research and practice. First, our conceptualization gives researchers a basic and unique understanding of the different types of internationally mobile persons. For instance, Tharenou (2015) shows that in about one third of the empirical studies on AEs no definition of the term was given. Moreover, studies on AEs and SIEs still apply samples, in which the different types of expatriates are not clearly differentiated (e.g. AE samples which also contained SIEs), thus hampering the comparability and interpretation of research results (Tharenou, 2015). Finally, our results reveal a new category of expatriates: managers who are offered jobs abroad (‘drawn expatriates’). Future research making a clear distinction between the different types of expatriates also gives valuable insights for MNCs, whose HR policies can be adapted to reach specific needs of each group of internationally mobile persons (e.g. developmental actions).

A second important component of the IRMR construct is the *readiness* to relocate abroad. Existing IRMR studies conceptualize ‘readiness’ heterogeneously, referring to different psychological constructs such as intention or willingness (cf. Remhof et al., 2014).

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These constructs have different implications for the meaning of IRMR. This heterogeneity also concerns the measurement of IRMR. Today, many different IRMR scales exist, which have not yet been compared or analyzed regarding their scientific validity (e.g. construct validity). Consequently, the main goals of our **second manuscript** are to provide a clear distinction between the different conceptualizations of IRMR, to review how past studies conceptualized and measured IRMR, and to deduce recommendations regarding future conceptualizations and measurements of IRMR. In a systematic literature review (*qualitative approach*), we screened 84 articles from three scientific disciplines (business, psychology and sociology). We applied “directed content analysis” (Potter & Levine-Donnerstein, 1999) to analyze our data. The coding starts with criteria which are deduced from theory and then allows for further criteria to emerge inductively from the data (cf. Hsieh & Shannon, 2005). We first provided a clear theoretical distinction between different conceptualizations of IRMR (e.g. desire, intention), which we then applied to analyze how past studies have conceptualized and measured IRMR (*deductive approach*). The remaining seven criteria emerged from the data itself (*inductive approach*). Based on the results of our literature review and the Rubicon model of action phases (Heckhausen & Gollwitzer, 1987), we recommend future research to consider the whole process of an individual’s decision to relocate abroad when conceptualizing and measuring IRMR. Focusing on single phases of the decision process regarding IRM (e.g. intention) can lead to misinterpretations regarding employees’ IRMR, as employees might just be in another decision phase (e.g. pre-decisional phase). Moreover, IRMR cannot be viewed separately from its context, since many factors (e.g. locations characteristics) influence employees’ IRMR in an interrelated and complex way (e.g. de Eccher & Duarte, 2016). Future conceptualizations and measurements of IRMR should consider this complexity. Finally, clarity and consistency regarding the kind of international work-related mobility IRMR focuses on is necessary (cf. *first manuscript*). Most IRMR scales measure the willingness to accept an international assignment, while ignoring the existence of several other forms of IRM such as self-initiated expatriates or global managers (cf. Tharenou, 2015).

Our results are valuable for both HR research and practice. First, our results increase the consistency and clarity of future IRMR conceptualizations and measurements. Conceptualizing and measuring IRMR as a dynamic multidimensional construct allows

companies to adjust their developmental actions to the challenges of the specific phase of an employee's decision-making process concerning international relocation. Moreover, by timely assessing the motives and barriers of employees concerning IRM (cf. Dickmann et al., 2008), companies can prevent problems (e.g. lack of partner's support) that might lead to the rejection of IRM at a later stage of the decision-making process. Location concerns are among the most common reasons for rejecting international moves (e.g. Adler, 1986; cf. de Eccher & Duarte, 2016). Hence, assessing location-specific preferences in an early stage of the decision-making process may prevent that employees later reject their international relocation plans.

The second part of this thesis is dedicated to explaining the cause-effect relations that lead to employees' IRMR. Existing studies mainly consider demographic factors as possible determinants of IRMR (e.g. Landau et al., 1992), while neglecting other important antecedents such as personality traits or the support of an employee's social environment (Otto & Dalbert, 2010; van der Velde et al., 2017). Therefore, the **third manuscript** follows the *(post) positivist school of research* and contains a *quantitative study* (survey data) on individual and social factors influencing employees' IRMR. We deduced our hypotheses based on the theory of planned behavior (TPB; Ajzen, 1991) and past research findings regarding IRMR (*deductive approach*). Our results from structural equation modeling (N= 273 employees) indicate that social norms and individual dispositions (i.e. personality traits and attitudes) play a crucial role for employees' IRMR. More specifically, the attitude of the closest social environment (e.g. family, friends) towards employees' IRM exhibits a positive and significant correlation with employees' IRMR. Moreover, specific personality traits (i.e. uncertainty tolerance, proactive personality) mediated by the employees' attitude towards IRM (i.e. boundaryless mindset) positively and significantly relate to employees' IRMR. Employees who show proactive behavior at work might also be tolerant for uncertainty and feel more capable of handling transitions across international and organizational boundaries.

Based on our results, prospective implications for HR research and practice become evident. First, we applied the TPB (Ajzen, 1991) to the IRMR context and extended the theory by further important variables (e.g. personality traits). In line with past IRMR research, our results indicate the importance of an employee's closest social network (e.g. partner) for IRMR (e.g. Otto & Dalbert, 2012; van der Velde et al., 2017). Hence, companies

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should consider the individual's family within the expatriate selection and development process (Brookfield GMAC, 2016), e.g. by providing professional and social support for the trailing spouse (McNulty, 2012). Summing up, the results of the third manuscript explain a crucial part of the IRMR construct by revealing individual as well as social antecedents of employees' IRMR. However, our empirical model is not able to capture the entire variance of the IRMR construct.

Recent research indicates that employees' perception of location-specific factors play an important role for IRMR (cf. de Eccher & Duarte, 2016). This and further influencing factors (e.g. dual career issues; cf. van der Velde et al., 2017) have not been integrated within a comprehensive theoretical framework. Moreover, we have not explored concrete cause-effect relations, i.e. which influencing factors are relevant in particular phases of an employee's decision-making process regarding IRM. A wide array of factors influences employees' IRMR in a complex and interrelated way. These multi-causal effects must be understood and considered within a theoretical framework about IRMR. In this context, the *(post-) positivist paradigm* we followed has some limitations. Moreover, a clear picture of the IRMR construct cannot be deduced from existing definitions or conceptualizations of IRMR, as these are heterogenous and lack information regarding important characteristics of IRMR (e.g. stability). Hence, we decided to follow a *constructivist approach* by interviewing individuals about their experiences with IRM (i.e. their 'realities'; cf. Charmaz, 2006) to close these important research gaps and finally create a clear picture regarding the IRMR construct and its antecedents. The **fourth manuscript** builds upon the findings of the other articles and finally *integrates* the two research aspects of this thesis by:

- (a) providing a clear definition and conceptualization of IRMR and
- (b) developing a theoretical framework that integrates and interrelates the different antecedents of IRMR.

Following a *grounded theory approach* (Charmaz, 2006) and based on 24 interviews, we developed a decision theory of IRM. Despite a relatively mature body of research on IRMR, we decided to apply grounded theory. Our objective was a theoretical framework which explains individuals' decision-making process regarding IRM comprehensively. Existing decision theories (e.g. Ajzen, 1991), which have often been applied to the IRMR

context (e.g. Remhof et al., 2014), explain only small parts of individuals' complex decision to relocate abroad (e.g. the influence of specific individual or social variables on IRMR). To draw a holistic picture of the (multi-) causal effects that lead to a high IRMR and develop a new theory, we decided to analyze individuals' perspectives and experiences regarding IRM. Our theory captures the relevant influencing factors of IRMR in each particular phase and explains the factors' interrelation as well as their effect on employees' IRMR. Moreover, the theory distinguishes between a stable basic IRMR and a temporary situational IRMR. Key influencing factors of the situational IRMR are the perceived fit and the perceived manageability of IRM. Personal initiative and self-efficacy play a major role in this process as both influence whether employees are (convinced to be) able to pursue IRM as a self-set goal, even under suboptimal situational conditions (e.g. a low perceived fit). A high adaptivity helps to handle the complexity and change associated with IRM and thus leads to highly perceived manageability of IRM.

The results of our fourth manuscript are of particular relevance for research and practice. First, we clearly define and conceptualize the IRMR construct. Thus, we improve the interpretation and comparability of future IRMR research results. Second, we develop a compelling new theory about employees' decision-making process regarding IRM that can be directly applied and tested by future IRMR research. Moreover, our theory exceeds existing decision theories (e.g. Ajzen, 1991; Perugini & Bagozzi, 2001). Those theories when applied to the IRMR context only consider single phases and influencing factors of individuals' complex decision to relocate abroad.

Our results also contribute to recent IRMR research that highlights the importance of individuals' perception of personal and situational variables for IRMR (cf. de Eccher & Duarte, 2016). We also show that specific personality traits are important for employees' basic IRMR and perceived manageability of IRM. Our results may help companies to improve the assessment, selection and development of expatriates (Brookfield GMAC, 2016). Our comprehensive theoretical framework allows to develop strategic measures that can be applied at the right time, depending on an employee's phase of decision-making regarding IRM.

No.	1	2	3	4
<b>Title</b>	<i>Addressing international mobility confusion - developing definitions and differentiations for self-initiated and assigned expatriates as well as migrants</i>	<i>Should I stay or should I go? A systematic literature review about the conceptualization and measurement of international relocation mobility readiness</i>	<i>International relocation mobility readiness and its antecedents</i>	<i>Employees' international relocation mobility readiness and its antecedents: A theoretical framework</i>
<b>Authors</b>	Maike Andresen Franziska Bergdolt Jil Margenfeld Michael Dickmann	Jil Weisheit	Maike Andresen Jil Margenfeld	Jil Weisheit Maike Andresen
<b>Journal</b>	<i>The International Journal of Human Resource Management</i>	<i>The International Journal of Human Resource Management; Journal of Global Mobility</i>	<i>Journal of Managerial Psychology</i>	<i>Working Paper</i>
<b>VHB-Ranking (Jourqual 3)</b>	B	B; not listed	B	--
<b>Publication status</b>	Published (January 2014)	3 <sup>rd</sup> round of revision (IJHRM); Published (June 2018)	Published (April 2015)	--
<b>Major contribution</b>	<ul style="list-style-type: none"> <li>• Development of a conceptualizing framework that clearly distinguishes between the different forms of international (relocation) mobility (i.e. AE, SIE and migrant).</li> <li>• Definition of the three terms.</li> </ul>	<ul style="list-style-type: none"> <li>• Providing a systematic overview about past conceptualizations and measurements of IRMR.</li> <li>• Deducing recommendations for future conceptualizations and measurements of IRMR.</li> </ul>	<ul style="list-style-type: none"> <li>• Empirical test of a model about IRMR and its individual and social antecedents.</li> </ul>	<ul style="list-style-type: none"> <li>• Providing a clear definition and conceptualization of IRMR.</li> <li>• Development of a comprehensive theoretical framework about IRMR and its antecedents.</li> </ul>
<b>Research question(s)</b>	<ul style="list-style-type: none"> <li>• <i>How can we clearly define and differentiate the terms AE, SIE and migrant?</i></li> </ul>	<ul style="list-style-type: none"> <li>• <i>Which psychological conceptualization best reflects the complexity of the IRMR construct?</i></li> <li>• <i>Which measurement best reflects the complexity of the IRMR construct?</i></li> </ul>	<ul style="list-style-type: none"> <li>• <i>Which individual and social factors influence employees' IRMR?</i></li> </ul>	<ul style="list-style-type: none"> <li>• <i>How should we define and conceptualize IRMR psychologically?</i></li> <li>• <i>Which factors influence IRMR in particular phases of an individual's decision-making process regarding IRM (cause-effect relations) and how</i></li> </ul>



				<i>do these factors interrelate and affect IRMR (multi-causal effect relations)?</i>
<b>Research design</b>	Conceptual / systematic literature review	Conceptual / systematic literature review	Empirical / quantitative study (survey design)	Empirical / qualitative study (interview design)
<b>Data basis / sample</b>	N = 136 English peer-reviewed journal articles	N = 84 English peer-reviewed journal articles	N = 273 (self-) employed German residents	N = 24 (self-) employed German residents
<b>Data analysis</b>	Qualitative content analysis (Mayring, 2000)	Directed content analysis (Potter & Levine-Donnerstein, 1999)	Structural equation modeling (Amos)	Grounded theory (Charmaz, 2006)
<b>Additional information</b>	<ul style="list-style-type: none"> <li>• Presented at the <i>Academy of Management Annual Meeting</i> in Boston, USA, 2012.</li> <li>• Presented at the <i>European Academy of Management Conference</i> in Rotterdam, the Netherlands, 2012.</li> </ul>	<ul style="list-style-type: none"> <li>• Accepted at the <i>Herbstworkshop</i> (Kommission Personalwesen) in Graz, Austria, 2014.</li> <li>• Accepted at the <i>European International Business Academy Conference</i> in Uppsala, Sweden, 2014.</li> </ul>	<ul style="list-style-type: none"> <li>• Presented at the <i>Academy of Management Annual Meeting</i> in Florida, USA, 2013.</li> <li>• Presented at the <i>European Association of Work and Organizational Psychology Conference</i> in Münster, Germany, 2013.</li> <li>• Presented at the <i>Herbstworkshop</i> (Kommission Personalwesen) in Hamburg, Germany, 2013.</li> </ul>	/

**Table 1: Overview of the four manuscripts included in this thesis**

Table 1 summarizes the main characteristics of the four manuscripts. As the manuscripts reached different levels of publication, the table also includes the journal and information on the current stage of publication for each manuscript.

## **1.4 Discussion**

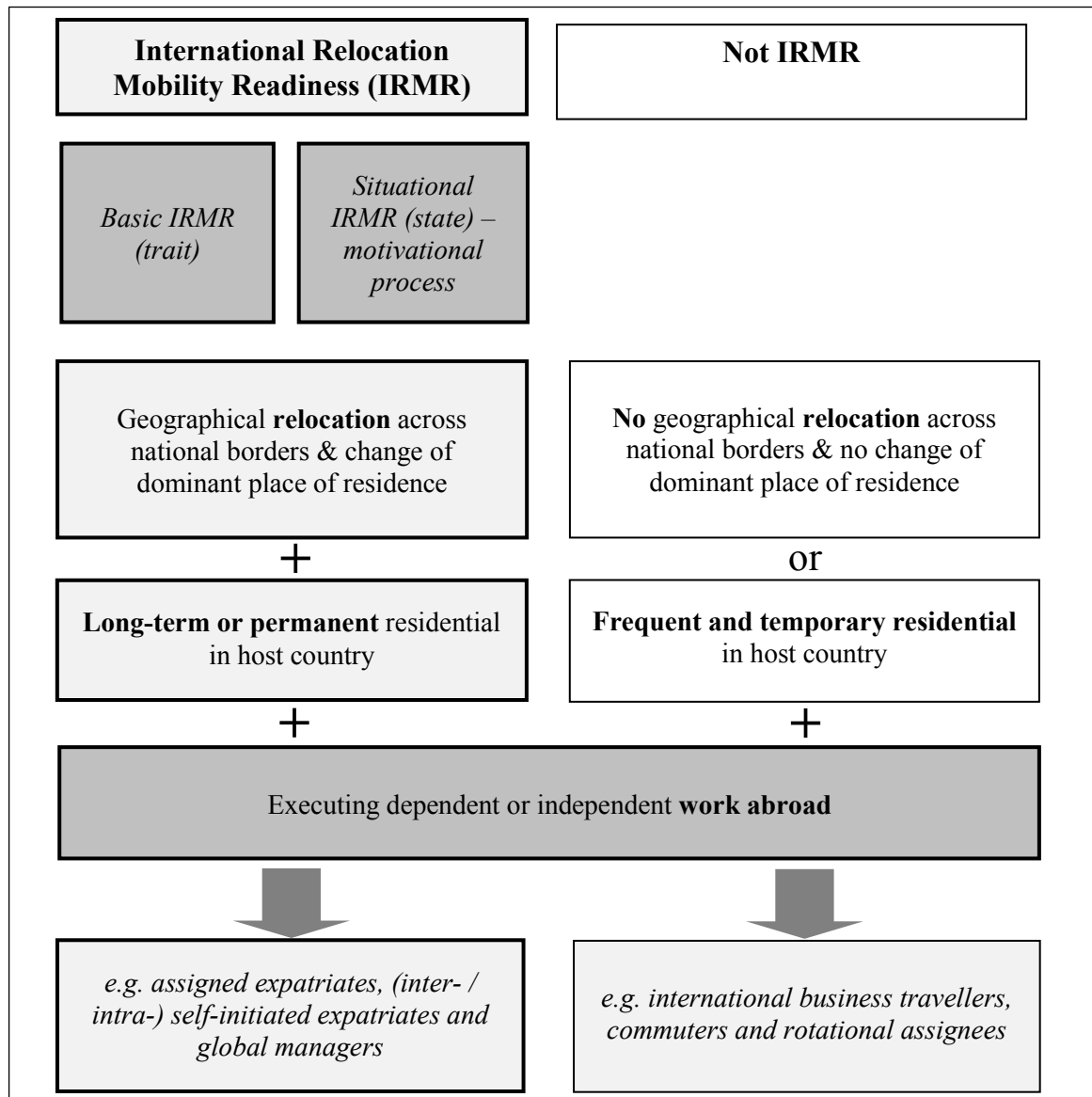
In this section, we will describe the theoretical and practical implications of this thesis. Based on a discussion of the limitations of this thesis, we will show new paths for future research within the IRMR context.

### ***1.4.1 Theoretical implications***

First, we provide a unique definition and conceptualization of IRMR, which reflects a decision process rather than a specific psychological construct (cf. *second and fourth manuscript*). The results of our *fourth manuscript* reveal that IRMR consists of two components: a stable basic IRMR (trait) and a temporary situational IRMR (state). Individuals' motivation to relocate abroad (i.e. situational IRMR) develops in two phases (i.e. perceived fit and perceived manageability) and is determined by individuals' perception and appraisal of individual and situational variables. In general, (work) motivation reflects an employee's energizing forces which influence the direction, intensity and persistence of work-related behavior (i.e. international relocation mobility) (Meyer, Becker, & Vandenberghe, 2004).

IRMR focuses on kinds of international work-related mobility that require an international relocation, i.e. a change of an individual's dominant place of residence when moving abroad (cf. *first manuscript*). Moreover, IRMR subsumes forms of IRM behavior that require a long-term or permanent residential in the host country (e.g. assigned and self-initiated expatriates). IRMR also considers global managers whose career paths usually include three or more long-term international assignments (cf. Tharenou, 2015). However, our understanding of IRMR excludes forms that do not involve a relocation such as international business travels (Welch, Welch, & Worm, 2007), or that require international

relocation on a frequent and temporary basis (e.g. rotational assignees; cf. Collings, Scullion, & Morley, 2007). Our definition of IRMR is depicted in Figure 2.



**Figure 2: Definition of IRMR based on the results of manuscripts one and four**

Second, our theory allows to assign the different influencing factors of IRMR to the different phases of an individual's decision process. Hence, our results exceed existing decision theories (e.g. Ajzen, 1991) that consider only specific influencing factors of IRMR

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(e.g. self-efficacy or perceived behavioral control) and lack a stable or trait-like component such as the basic IRMR. Especially research on motives for *past* international mobility decisions (e.g. Dickmann et al., 2008; Dickmann, 2012; Doherty, Dickmann, & Mills, 2011) considers lists of possible influencing factors of IRMR, which now can be classified into a theoretical framework. This helps to explore interrelationships between the different antecedents of IRMR and how they affect IRM behavior.

Moreover, our results highlight the importance of specific personality traits for employees' IRMR (cf. *third and fourth manuscript*). While some studies have already investigated the influence of personality on employees' IRMR (e.g. Mol et al., 2009; Otto & Dalbert, 2012), none of them explains in which particular phase of the decision-making process specific individual traits become relevant. We show that a bundle of specific personality traits influences employees' basic IRMR (e.g. experience seeking). Moreover, personality traits also influence the concrete decision-making process regarding IRM, i.e. the perceived manageability of IRM behavior (e.g. uncertainty tolerance). The proactive personality (cf. *third manuscript*) is also reflected in the construct 'personal initiative', which plays an important role for nearly the whole decision-making process regarding IRM and also for IRM behavior. Individuals who show a high personal initiative regarding IRM also proactively anticipate problems that might occur abroad and develop respective action strategies (Frese & Fay, 2001)

Finally, our results highlight the importance of employees' closest social environment (esp. partner and children) for employees' IRMR (cf. *third and fourth manuscript*). This is in line with recent IRMR and international HRM research (e.g. Cole & Nesbeth, 2014; van der Velde et al., 2017). However, we also specify the mechanisms that explain how these social factors influence employees' IRMR. For instance, we found that employees strongly differ regarding their perception of barriers concerning the social environment (cf. perceived fit phase) and that social factors influence IRMR in an interrelated way (e.g. children are not perceived as barriers of IRM in case of partner's support). Most IRMR studies investigate the influence of 'objective' factors (e.g. marital status or amount of children) on employees' international relocation decisions (e.g. Landau et al., 1992). However, the influence of these factors largely depends on employees' perception and hence is highly subjective. Interviews are a suitable research instrument to

capture this subjectivity, while quantitative studies only assess a small part of this complexity.

#### **1.4.2 Practical implications**

MNCs also highly profit from our research results, as they can directly apply our theoretical framework to improve their selection, assessment and development of expatriates (Brookfield GMAC, 2016). Our comprehensive theoretical framework (cf. *fourth manuscript*) allows companies to apply strategic measures at the right time, depending on an employee's phase of decision-making regarding IRM. While expatriate selection is one of the key areas MNCs worldwide want to improve in, they seldom apply formal procedures to select candidates for international postings (Brookfield GMAC, 2016). Caligiuri and Tarique (2012) recommend three practices to systematize the expatriation selection process. The first is to provide the expatriate with *realistic previews* according to the challenges associated with IRM. This method helps to create realistic expectations about the expatriation and should include the whole family (Caligiuri & Tarique, 2012). Results by Caligiuri and Phillips (2003) showed that realistic previews increase the expatriate's self-efficacy, which in turn positively influences expatriate performance abroad. Companies could apply the results of this thesis to timely clarify the situational conditions of IRM (e.g. kind of organizational support, locations) and the tasks or challenges associated with different phases of employees' decision-making process regarding IRM (e.g. barriers). Interviews could be a valuable method to exchange the company's conditions of IRM and employees' expectations regarding IRM (e.g. preferred locations). This helps employees to evaluate, whether IRM fits to their current situation (cf. perceived fit phase) and strengthens employees' self-efficacy, which in turn positively influences the perceived manageability of IRM (cf. *fourth manuscript*).

The second recommended procedure is a formal *self-selection process*, in which employees reflect about the fit between their personal, career and family situation and the company's condition of international mobility (perceived fit phase, cf. *fourth manuscript*). Self-selection instruments (e.g. IRMR scales; cf. *second manuscript*) can help employees during this reflection process (Caligiuri & Philips, 2003). The results of the expatriates' self-

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assessment can be used to create a pool of potential expatriate candidates. This pool should be combined with a data base, which contains information on employees' family situation, preferences (e.g. locations), abilities (e.g. language skills) and motives (e.g. professional development) among others. As some of these information can change over time (e.g. family situation) the self-assessment should be repeated regularly (cf. Caligiuri & Tarique, 2012). In line with this, the results of our *fourth manuscript* show that specific individual attributes (e.g. language abilities) are important for employees' IRMR as they influence the cognitive, emotional and motivational appraisal of IRM within the perceived fit phase.

The third selection practice is *expatriate assessment*, including the assessment of expatriates along job-related dimensions, which mainly depend on the specific purpose of the international assignment. For example, personality traits (e.g. experience seeking or intercultural interests) are particularly important for the success of developmental assignments, as they require more contact to host country nationals than technical assignments (Caligiuri, 2000; cf. Caligiuri & Tarique, 2012). In addition, Caligiuri and Tarique (2012) stress that the expatriate selection and assessment process should start early, even before a position abroad becomes available. Since the basic IRMR plays an important role for the decision-making process regarding IRM, companies should assess employees' basic IRMR and its determinants (e.g. specific personality traits) at an early stage (cf. *fourth manuscript*). Further, the family should be involved as early as possible in the decision-making process (van der Velde et al., 2017).

A second way for companies to increase the success of international assignments is offering international training or development activities (cf. Caligiuri & Tarique, 2012). They foster learning among expatriates and contribute to their competency development, which in turn improves the organization's international success. For example, cross-cultural trainings provide expatriates with knowledge about intercultural differences and their impact on the individual's adjustment abroad (Tarique & Caligiuri, 2009). In this way, employees' uncertainty associated with IRM could be reduced (cf. *third manuscript*) and employees' self-efficacy regarding IRM could be strengthened (perceived manageability phase, cf. *fourth manuscript*). However, the employees' uncertainty can also be grounded in the lack of ability to speak the host country's language. In this case, companies should offer language

trainings or possibilities to interact with employees speaking the host country's language (cf. Caligiuri & Tarique, 2012).

Summing up, both expatriation selection and development processes reflect crucial HR leavers to identify employees who have a high IRMR and to develop employees in reaching the company's optimal level of IRMR.

### ***1.4.3 Limitations and further research***

This thesis must also be viewed in the light of its limitations which reveal interesting fields for further research. First, future studies must prove our decision theory of IRM empirically as well as apply and test our definition and conceptualization of IRMR (cf. *fourth manuscript*). Since we investigated a specific group of employees, it is important to prove whether our results also generalize to other populations and samples. By now, most studies on IRMR were based in industrialized Western countries (e.g. Boies & Rothstein, 2002; van der Velde, Bossink, & Jansen, 2005; cf. Kim & Froese, 2012). There are a few sociological studies investigating samples from less industrialized or developing countries (e.g. Epstein & Gang, 2006). We cannot rule out, that the contextual conditions of IRM might differ between countries (e.g. between developing and developed countries). For example, Kim and Froese (2012) found for a Korean sample that, if necessary, employees would not mind relocating abroad without their family, because they perceive IRM more as an organizational 'order' than an individual 'choice'. Hence, cross-cultural studies would be interesting to reveal whether our theory explains employees' IRMR in different cultural contexts (Tung, 2008).

Moreover, in both empirical manuscripts we applied a cross-sectional design (cf. *third and fourth manuscript*). This is in line with most of the studies conducted on IRMR (e.g. de Eccher & Duarte, 2016; Konopaske & Werner, 2005). However, longitudinal studies would be helpful to find out more about the stability of the (basic) IRMR construct and the dynamic of the different phases of an individual's decision to relocate abroad (e.g. perceived manageability of IRM). Moreover, the influence of life stages on the stability of the IRMR construct can be proved within a longitudinal study. Levinson (1986) characterizes adult life by a succession of different life stages, ranging from early to late adulthood. Each of these

life stages is associated with different tasks or goals to be accomplished. Especially in the early adulthood, employees face both high work and non-work demands, which could decrease employees' IRMR (cf. Demerouti, Peeters, & van der Heijden, 2012).

We mainly relied on self-report data (cf. *third and fourth manuscript*), being prone to the influence of social desirability, i.e. "the tendency of some people to respond to items more as a result of their social acceptability than their true feelings" (Podsakoff, MacKenzie, Lee, & Podsakoff, 2003, p. 882). For example, the participants of our studies could have pretended to have a high IRMR, because it is socially desirable to be internationally mobile. However, as IRMR is a subjective construct, participants can best assess their motivation themselves. Additionally, IRMR was mainly measured via self-report in past studies (e.g. Konopaske et al., 2009).

Future research might also prove the relevance of IRMR for expatriation success (e.g. adjustment abroad) and organizational success (e.g. ROI) in an empirical study (McNulty, De Cieri, & Hutchings, 2013). Dysfunctional high levels of (basic) IRMR combined with specific personality traits (e.g. experience seeking) that lead to high turnover rates can be another interesting field of research. Job embeddedness might be an interesting construct in this context, as it ties employees to organizations, jobs and communities (Shen & Hall, 2009).

A final interesting path for future research is the development and validation of an IRMR scale that covers the whole complexity of the IRMR construct (e.g. the different decision phases and influencing factors). Our recommendations regarding the measurement of IRMR (cf. *second manuscript*) as well as our decision theory of IRM form the basic ground for future IRMR scale development studies.

## **1.5 Conclusion and outlook**

The insights we gain by this thesis address two important research fields of IRMR. Each manuscript of this thesis contributes significantly to the explanation of IRMR. Based on our results, the IRMR construct can now be defined and conceptualized in a clear and distinct way. Furthermore, we deduce a theoretical framework that explains the whole



decision-making process regarding IRM and captures multi-causal effect relations that lead to IRMR and IRM behavior. By this means, we close two highly relevant research gaps and provide important contributions to IRMR research.

Employees' mobility across international borders has been and continues to be an interesting research field with high practical relevance. Extensions of existing approaches and new developments will be necessary to understand and control the entire complexity of the expatriation process. We hope that the results generated and discussed by this thesis will be carried further ahead and find way to implementations in practice. To conclude, we remain excited about future developments in this research area.

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## **2 Addressing international mobility confusion – developing definitions and differentiations for self-initiated and assigned expatriates as well as migrants**

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### **2.1 Abstract**

The literature on international human resource management indicates a growing array of different forms of international work experiences such as assigned and self-initiated expatriation. However, the criteria for demarcation of these different forms and the term ‘migrant’ are often unclear which leads to an unfortunate lack of comparability of research and a potential confusion for readers. Based on the sociological, psychological and economics literature, this article reviews and synthesizes the existing definitions of the three terms in the current research. A qualitative content analysis and the Rubicon model (Heckhausen & Gollwitzer, 1987) are used as a theoretical base to structure the findings. The paper creates a criteria-based definition and differentiation of terms and then develops a typology of four different types of expatriates: assigned expatriates, inter-self-initiated expatriates, intra-self-initiated expatriates and drawn expatriates. Implications for management as well as for future research are outlined.

**Keywords:** assigned expatriate, drawn expatriate, expatriate typology, migrant, qualitative content analysis, self-initiated expatriate



## 2.2 Introduction

International mobility has seen a substantial increase in interest through recent academic work. The literature on international human resource management indicates a growing array of different forms of international work experiences (Briscoe, Schuler, & Claus, 2009; Selmer & Luring, 2011b). However, the criteria for demarcation of these different forms are often unclear (Baruch, Dickmann, Altman, & Bournois, 2013; Doherty, 2013) which leads to an unfortunate lack of comparability of research and a potential confusion for readers. In particular, the terms ‘self-initiated expatriation’ (SIE), ‘assigned expatriation’ (AE) and ‘migration’ seem to be overlapping and are often applied interchangeably in current expatriation research.

Several authors agree on the difference between the terms ‘assigned expatriate’, denoting an employee who is sent abroad by his/her<sup>1</sup> company, usually receiving an expatriate contract and the ‘self-initiated expatriate’, meaning an individual who undertakes his international work experience with little or no organizational sponsorship, often with a less favorable local work contract (Biemann & Andresen, 2010; Peltokorpi & Froese, 2009; Suutari & Brewster, 2000). However, confusion exists on how to deal with company-sponsored expatriates who initiated the move abroad themselves with many researchers simply treating these as AEs (Sparrow, Brewster, & Harris, 2004). While this may capture the effects of the support these individuals gain from their organizations, it is not likely to be nuanced enough in areas such as motivations to work abroad (Doherty, Dickmann, & Mills, 2011). Below, we argue the point and provide criteria on how to further differentiate SIEs into *intra*-organizational SIEs (Intra-SIEs) remaining in their employing organization and *inter*-organizational SIEs (Inter-SIEs) changing their employers (Andresen, Bergdolt, & Margenfeld, 2012).

Moreover, the difference between the terms AE, SIE and migrant seems to be less evident (Al Ariss, 2010). In general, international migration can be defined as physical movement from one geographic point to another (Agozino, 2000), crossing national borders (Boyle, Halfacree, & Robinson, 1998). The UN specifies a migrant as “any person who changes his or her country of usual residence” (United Nations, 1998, p. 17), with the

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<sup>1</sup> For ease of reading we will use only the male form in the text below.

“country of usual residence” representing the place where the person has the center of his life (United Nations, 1998). To date, there are only a few articles in the expatriation literature that demarcate the terms AE, SIE and migrant (Al Ariss, 2010; Baruch, Dickmann, Altman, & Bournois, 2010; Briscoe et al., 2009). Unfortunately, these are not sufficiently based on a systematic literature analysis and are often highly prescriptive.

Therefore, there is a need to uniquely demarcate the terms AE, SIE and migrant by systematically reviewing existing definitions of an AE, SIE and migrant in current research literature, by examining regularities and differences in the application of the three terms and by developing a criteria-based definition and differentiation of them. The Rubicon model of action phases (following Heckhausen & Gollwitzer, 1987; Heckhausen & Heckhausen, 2010) is used afterwards as a theoretical framework to structure the findings. This will contribute to both research and practice. In research, the demarcation contributes to more clarity in research design as well as to a more precise interpretation and better integration of research results in the future. Moreover, with respect to career management in practice, a clearer demarcation of the different groups of internationally mobile employees, i.e. AEs, Intra- and Inter-SIEs, allows for the development of differentiated corporate HR policies and practices.

This article is organized as follows: first, the literature to demarcate SIEs, AEs and migrants is briefly summarized. Second, a description of the methodologies applied to come to a differentiation of the terms AE, SIE and migrant is provided. Third, the final results of the analysis are presented and discussed. Finally, this article closes with theoretical as well as practical implications of the results and provides suggestions for further research.

### **2.3 Current attempts to demarcate SIEs, AEs and migrants**

A few attempts to demarcate the terms SIE, AE and migrant can be found that differ vastly with respect to the criteria chosen and the results. Baruch et al. (2013) distinguish different modes of international work experiences along seven dimensions (time spent, intensity of international contacts, breadth of interaction, legal context, international work instigator, extent of cultural gap and specific position). According to the authors, the time

spent abroad is longer for SIEs than for AEs. Furthermore, SIEs in contrast to AEs are not sponsored by an organization and are less likely to gain objective career benefits from their expatriation. In addition, Baruch et al. (2010) distinguish expatriates from migrants in terms of rights to permanent residency, meaning that an expatriate might become a migrant when gaining citizenship or permanent visa status.

Al Ariss (2010) differentiates the terms SIE and migrant along four main criteria: geographical origin and destination of the internationally mobile, the forced/chosen nature of the movement, the period of stay abroad and the positive or negative connotations of the terms. First, Al Ariss assumes that migrants, in contrast to SIEs, might often move from less-developed countries to developed countries. Second, migrants and not SIEs might be rather forced to leave their home country, e.g. because of unemployment. Third, SIEs might be more transient in their movement abroad than migrants who may eventually become permanent migrant workers when deciding to stay in the new country. Last, the term migrant might be referred to in more negative terms (e.g. denoting inferiority) than the term SIE (Al Ariss, 2010). In contrast to this dissociation of terms, recent literature on migration indicates the existence of migrant subgroups, for instance, described as ‘qualified migrants’ (Zikic, Bonache, & Cerdin, 2010) or ‘transnational knowledge workers’ (Colic-Peisker, 2010), neither including individuals who are forced to move nor individuals who are staying permanently in the host country.

Finally, Briscoe et al. (2009) distinguish between 20 different terms of international work experiences, defining SIEs as “individuals who travel abroad (usually as tourists or students) but who seek work as they travel and are hired in the foreign location, often by firms from their home country” (Briscoe et al., 2009, p. 169). In contrast, migrants are described as employees who are hired to work in a foreign subsidiary or in the parent company and whose citizenship is in another country (Briscoe et al., 2009).

As the numerous criteria chosen in the above-mentioned articles have not been systematically derived from literature and the demarcations are not thoroughly documented with sources and empirical evidence, the criteria as well as the results might not be exhaustive and their accuracy needs to be verified. This research gap is the starting point for our literature analysis as described below. We will compile the literature and explore the key

definitions and use of the terms. One of the key goals of this paper is to clarify the distinctions, draw up clear definitions and develop a framework of different types of self-initiated and assigned expatriates. These steps have numerous managerial and theoretical implications.

## **2.4 Methodology**

### **2.4.1 Database**

In order to demarcate the terms AE, SIE and migrant, a sample of articles defining one or several of the different groups of internationally mobile employees was identified using an adapted version of the approach developed by David and Han (2004). For the identification of a relevant sample of studies, the following criteria were used.

1. The data used for the analysis were taken from theoretical and empirical studies in the field of expatriation and migration published in peer-reviewed scholarly journals only. The elimination of book chapters or unpublished works for example served to enhance quality control.
2. The articles were retrieved from the EBSCO Host, PsychINFO and Social Sciences Citation Index databases. In order to ensure that recent strands of research on the topic of expatriation and migration were covered, the review focused on articles published in the years 2005 to 2010. However, as the field of research on SIEs is still emerging and the number of definitions available for the term 'self-initiated expatriate' falls substantially below the number of definitions available for the terms 'expatriate' and 'migrant', the selection of English-language peer-reviewed journal articles was expanded to cover the period from 1997, when the first article about self-initiated expatriates was published, to 2011.
3. In order to ensure quality, only journals were taken into consideration with a high accumulated impact factor from 2005 to 2010 of the respective journals

using the ISI-index. For SIE, non-listed journals were included due to the limitations in published research mentioned above.

4. Substantive relevance was ensured by requiring that selected articles contain at least one primary keyword in their title or abstract, i.e. 'expatriate' or 'migrant'. This meant that it was highly likely that the selected articles contained a definition of at least one of the groups.
5. Quantity was managed by exclusively selecting articles published in journals that included multiple articles about expatriation or migration and by purposely selecting journals that have the highest number of hits in a full-text search using the search terms 'expatriate' and 'migrant'. We deviated from this fifth criterion with respect to articles about SIE to also include journals in which only one article has been published and also those with a low number of hits.

Due to the extensive usage of the terms 'expatriate' and 'migrant' in the literature, the analysis was narrowed down to ten peer-reviewed journals: five business (HRM) and psychological journals (serving as a basis for the definitions of 'expatriate') and five sociological journals (serving as a basis for the definitions of 'migrant').

Table 2-Table 4 show the number of articles and definitions returned using this methodology with a final sample size of 136 articles. The tables show that these sample articles contain, overall, 246 definitions of the terms 'expatriate' (74), 'self-initiated expatriate' (88) and 'migrant' (84). Not all articles contained a proper definition of all terms and some articles included more than one definition.

	Accumulated number of hits for the search term 'expatriate' in the chosen data bases (full-text search)	ISI impact factor 2005-2010	Number of relevant articles	Number of relevant definitions
International Journal of HRM	280	1.61	51	74
Journal of World Business	64	2.82	10	
Human Resource Management	62	1.83	7	
Career Development International	33	1.31	3	
Journal of Applied Psychology	24	6.73	3	
		(not listed in the years 2005-2009)		

**Table 2: Impact factors and numbers of hits in the databases for the term 'expatriate'**

	Accumulated number of hits for the search term 'migrant' in the chosen data bases (full-text search)	ISI impact factor 2005-2010	Number of relevant articles	Number of relevant definitions
Journal of Ethnic and Migration Studies	254	1.42	7	84
Ethnic and Racial Studies	173	1.92	16	
Social Science & Medicine	163	3.48	6	
Global Networks – A Journal of Transnational Affairs	88	2.02	23	
International Migration Review	64	2.15	35	

**Table 3: Impact factors and numbers of hits in the databases for the term 'migrant'**

	ISI impact factor 2005-2010 (average)	Number of relevant articles	Number of relevant definitions
International Journal of HRM	1.61	21	88
Career Development International	1.31 (not listed in the years 2005-2009)	15	
Journal of Managerial Psychology	2.15 (not listed in the years 2005-2007)	6	
Cross Cultural Management	not listed	6	
Journal of World Business	2.82	5	
Canadian Social Science	not listed	5	
Thunderbird International Business Review	not listed	4	
Employee Relations	not listed	4	
Human Resource Management	1.83	3	
International Studies of Management & Organization	not listed	3	
Management Review	not listed	2	
Journal of Business Ethics	1.60	2	
Academy of Management Journal	10.78	2	
Journal of Organizational Behavior	4.41	1	
Ethnic and Racial Studies	1.92	1	
Personnel Review	1.17	1	
International Journal of Organizational Analysis	not listed	1	
International Journal of Cross Cultural Management	not listed	1	
International Journal of Business and Management	not listed	1	
Public Policy and Administration	not listed	1	
University of Auckland Business Review	not listed	1	
Industrial and Commercial Training	not listed	1	
European Management Review	not listed	1	

**Table 4: Impact factors of the papers relevant for the definition of the term ‘self-initiated expatriate’**

### **2.4.2 Data Analysis**

We used content analysis (Mayring, 2000) in order to analyse and compare the available definitions of the terms AE, SIE and migrant. Qualitative content analysis serves to systematically gather and evaluate qualitative data and is defined as an empirical analysis of texts within their context (Mayring, 2000). The identified meaning units (i.e. definitions of the three terms in journal papers) have been coded verbatim using statistical software (SPSS) while disjoining them in meaningful clauses. The clauses were assigned to 15 categories which were deduced from an evaluation of definitions found in standard business and sociological textbooks as well as induced from the data. According to Krippendorff (1980), a category consists of several pieces of content that share a commonality. By using frequency analysis, the categories have been evaluated according to the most frequently emerging characteristics.

In a second step, the results of the frequency analysis were refined by a further systematic analysis of the whole content of the database described above in order to develop powerful and distinct criteria out of the identified categories. The results section explicates how this enabled us to clearly distinguish between the three terms.

## **2.5 Results**

The final criteria list has been divided into four different aspects (see Table 5): individual level (criteria concerning the expatriate/migrant himself, e.g. initiative to go abroad), organizational level (criteria concerning the organization, e.g. decision of employment), political/legal level (criteria concerning state or political and legal facilities, e.g. visa status) and finally, criteria with respect to mobility in general (e.g. destination country).



		SIE (N=88)	AE (N=74)	Migrant (N=84)
Criteria	Distinct for demarcation	Implications		
<b>Individual level</b>				
Duration	ambiguous	<b>Long-term, temporary to permanent, rather not predetermined</b> 2; 7; 11; 37; 54; 68; 73; 76; 113; 114; 119; 132	<b>Long-term, temporary to permanent, rather predetermined period</b> <sup>16</sup> ; 29; 38; 54; 56; 73; 78; 80; 84; 85; 107; 89; 91; 104; 115; 117; 121; 123; 126; 128	<b>Long-term, temporary to permanent, repeated periods</b> 2; 28; 65; 69; 82; 87; 96; 105; 109; 129; 131
Initiative (5)	distinct	<b>Individually initiated</b> <sup>2</sup> ; 3; 7; 9; 13; 23; 35; 36; 37; 43; 55; 58; 59; 73; 76; 84; 85; 100; 102; 104; 110; 113; 119; 132	<b>Organizationally</b> <sup>16</sup> ; 18; 33; 34; 38; 64; 66; 73; 80; 84; 85; 89; 91; 93; 99; 104; 111; 115; 121; 128 <b>or</b> <b>individually and organizationally initiated</b> 52; 119	<b>Individually initiated</b> <sup>7; 67</sup> <b>or politically initiated</b> <sup>4; 40</sup>
Motives	ambiguous	<b>Personal and professional motives with a dominance of personal goals</b> <sup>9</sup> ; 13; 35; 36; 37; 43; 44; 54; 55; 58; 60; 76; 84; 85; 102; 103; 104; 107; 114; 119	<b>Personal and professional motives with a dominance of organization-related goals</b> 10; 18; 20; 23; 33; 34; 38; 64; 66; 80; 84; 85; 99; 104; 107; 111; 115; 123; 127	<b>Different reasons, rather economic or political</b> <sup>5</sup> ; 8; 28; 31; 46; 50; 55; 62; 69; 71; 82; 88; 105; 116; 124; 125; 131
Repatriation	ambiguous	<b>Either intention to repatriate or not</b> <sup>2</sup> ; 13; 55; 119	<b>Rather intention to repatriate, repatriation agreement</b> <sup>14</sup> ; 25; 49; 56; 63; 66; 73	<b>Either intention to repatriate or not</b> <sup>2; 5; 19</sup> ; 48; 86
Emotional Attachment to Home/Host Country	ambiguous	<b>Home and/or host country</b> <sup>12</sup>	<b>Home and/or host country</b> <sup>17</sup>	<b>Home and/or host country</b> <sup>8; 48; 105</sup>
Relocation of family	ambiguous		<b>Either relocation of family or not</b> <sup>29; 34; 41</sup> ; 49; 63; 73; 108	
Consequences for Individual	ambiguous			<b>In tendency social ties in several countries</b> 105; 120; 125
<b>Organizational level</b>				
Executing Work Abroad (3)	distinct	<b>Employed individuals</b> <sup>1</sup> ; 6; 9; 13; 17; 20; 23; 32; 35; 43; 55; 57; 72; 73; 102; 103; 104; 113; 114; 132	<b>Employed individuals</b> <sup>10</sup> ; 16; 18; 20; 27; 33; 34; 49; 54; 63; 66; 78; 80; 99; 104; 111; 115; 126; 127; 128	<b>Individuals; occupation not mandatorily necessary</b> <sup>40</sup> ; 70; 81; 90; 106; 130
Legality of Employment (4)	Distinct for illegal workers	<b>Legal, mostly dependent employment</b> <sup>13; 43</sup> ; <b>sometimes independent work activities</b>	<b>Legal, mostly dependent employment</b> <sup>84</sup> ; <b>sometimes independent work activities</b>	<b>working</b> <sup>106</sup> <b>or not working; legal or illegal work</b>

Organizational support	ambiguous	<b>No or little support from employer</b> 4; 9; 13; 36; 43; 44; 55; 61; 72; 77; 84; 85; 92; 94; 95; 100; 101; 102; 103; 110; 112	<b>High support from home and host organization</b> 20; 54; 73; 84; 85; 104	<b>Depends, all scenarios possible</b> <sup>130</sup>
Career	ambiguous	<b>Self-managed career</b> 1; 6; 13; 85; 101; 102; 103; 104; 110	<b>Organizational career</b> 73; 84; 104	<b>Not necessarily career-related</b> <sup>32</sup>
Contract partner (6)	distinct	<b>New work contract partner</b> <sup>12; 13; 32; 35;</sup> 43; 55; 84; 85; 93; 102; 103; 110	Current work contract partner <sup>97</sup>	<b>Not mandatorily necessary, all scenarios possible</b> <sup>130</sup>
<b>Political / legal level</b>				
Citizenship	ambiguous	<b>Maybe or not</b> <sup>4</sup>	<b>Not aspired, but might change abroad</b> 21; 45	<b>May be citizen or not</b> 15; 22; 26; 28; 42; 51; 69; 70; 74; 75; 81; 118
Visa Status	ambiguous	<b>Yes, work permit; status depends on immigration policies</b> <sup>4</sup>	<b>Yes, work permit; status depends on immigration policies</b> <sup>83</sup>	<b>Either visa or not</b> 28; 40; 48; 69; 82; 88; 122
Assessment (taxation)	ambiguous	<b>Rather in host country (local contract)</b> <sup>39</sup>	<b>Rather in home country (expatriate contract)</b> 21; 39; 83	<b>Rather in host country (local contract) or no taxes (no contract)</b> <sup>98</sup>
<b>Movement in general</b>				
Internal versus external organizational mobility (7)	distinct	<b>Crossing national and organizational boundaries</b> <sup>2; 3; 6; 7; 9; 13; 23; 32; 37; 43; 55; 57; 58;</sup> 76; 77; 84; 85; 100; 104; 113; 119	<b>Crossing national but not organizational boundaries</b> <sup>20; 29; 53; 104; 107; 115</sup>	<b>Crossing national boundaries</b> <sup>2; 8; 19; 24; 26; 28; 30; 31; 46; 47; 55; 62; 74; 79; 96; 105; 109;</sup> 125; 131
Origin	ambiguous		<b>Starting from a company</b> 16; 20; 27; 53; 54; 80; 85; 89; 104; 107; 117	<b>Starting from a by tendency developing country</b> <sup>3; 2; 8; 28; 68; 124; 131</sup>
Destination	ambiguous	<b>Going to foreign country</b> 2; 7; 9; 13; 32; 37; 43; 54; 55; 76; 85; 92; 93; 100; 102; 103; 113; 114; 119	<b>Going to foreign subsidiary</b> 10; 16; 18; 20; 29; 33; 34; 38; 53; 56; 66; 73; 78; 80; 84; 85; 89; 91; 93; 99; 104; 107; 111; 115; 123; 127	<b>Going to foreign country</b> 2; 5; 8; 28; 46; 82; 87; 96; 116

Note: The superscript numbers refer to the numbered references; the number in brackets refers to the distinct criteria depicted in Figure 3

**Table 5: Criteria list for the demarcation of the terms migrant, assigned expatriate and self-initiated expatriate**

Results of the qualitative content analysis indicate first that there is no consistency in the literature regarding how each of the three individual terms is defined. Taking the term migrant as an example, there are definitions that indicate migrants stay permanently in the immigration country (Massey & Bartley, 2006), whereas Wiles (2008), for example, states that the term migrant is associated with temporary dwelling of the individual in a foreign country. Second, Table 5 clearly shows that several criteria for demarcation of the terms AE, SIE and migrant are available.

Whereas the length of stay of SIEs in the host country is considered to be not predetermined (Suutari & Brewster, 2000), AEs are often expected to stay for a previously predetermined time frame (Peltokorpi & Froese, 2009). This also explains why some authors provide a minimum and maximum duration when defining the term AE (e.g. Collings, Scullion, & Morley, 2007). This does not apply for the other two groups. In addition, in most cases SIEs are not expected to repatriate (Crowley-Henry, 2007), while AEs are likely to repatriate to their home country (Huang, Chi, & Lawler, 2005).

Regarding the ‘initiative’ criterion, the term SIE is indicative of a more active individual who chooses to leave (Harrison, Shaffer, & Bhaskar-Shrinivas, 2004) and initiates the expatriation himself (Myers & Pringle, 2005), whereas for AEs the transfer is often initiated by the company (Peltokorpi & Froese, 2009). Differences concerning initiative are also reflected by the ‘motive’ criterion for expatriation. While SIEs seem to expatriate due to personal motives such as self-development, AEs primarily leave in order to accomplish a job- or organizational-related goal (Peltokorpi, 2008). Hence, AEs get support from their organizations (Meyskens, von Glinow, Werther, & Clarke, 2009) such as training prior to the departure (Howe-Walsh & Schyns, 2010), whereas SIEs are not sponsored by a company (Carr, Inkson, & Thorn, 2005). Therefore, a self-initiated expatriation rather often, but not always, implies a movement across different organizations (Inkson, Arthur, Pringle, & Barry, 1997). Contrary to that, assigned expatriates move within the boundaries of one organization (Baruch & Altman, 2002). Following this line of thought, definitions of the term AE often refer to employees (Caligiuri, 2000) or managers (Tharenou & Harvey, 2006), whereas SIEs describe individuals who seek employment (e.g. Carr et al., 2005), implying an independent movement. Consequently, AEs regard their foreign assignment as part of

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their organizational career (Siljanen & Lämsä, 2009) unlike SIEs who often follow an individualized career path (Carr et al., 2005).

For migrants, in contrast to AEs and SIEs, the movement across national borders rather than organizational boundaries is the primary focus (Milewski & Hamel, 2010). Main motives for migration are settlement in the new country (Waldinger, 2008) and improvement of individual economic conditions (Tharmaseelan, Inkson, & Carr, 2010). The literature on migrants also acknowledges that there are several consequences for the individual that result from the geographical relocation, such as relationships that span across borders (Glick-Schiller, 2003). This circumstance is not considered in the definitions of expatriates. Furthermore, migrants are characterized by political and legal characteristics such as country of birth (Massey & Bartley, 2006) and country of residence (Parreñas, 2010) as well as visa status (Preibisch, 2010). Strikingly, the organization-related criteria from the expatriate literature, for instance, organizational support, do not appear in the migration literature. Hence, the concept of expatriation is tailored to the organizational context of working abroad, whereas the concept of migration is tailored to the general context of crossing geographical borders.

Below, we build on the qualitative content analysis to outline the differentiated definitions of the terms migrant, assigned expatriate and self-initiated expatriate. We applied only criteria which the literature has identified as clear-cut and unambiguous (distinct). A criterion was classified as distinct if it distinguishes at least two of the three groups. In Table 5 an overview is given in Column 2, outlining which criteria are suitable for such a demarcation ('distinct') and which criteria are not precise enough ('ambiguous'). By this means we found five distinct criteria which were further underpinned by theoretical models such as the Rubicon model of action phases (Heckhausen & Gollwitzer, 1987). Due to the fact that the analyzed literature did not generate any distinct criteria for the differentiation between migrants and non-migrants, two further distinct criteria have been derived from already existing official definitions (e.g. United Nations, 1998, and OECD Model Tax convention, 2012, outlined below). The following discussion is solely built on these seven distinct criteria (see also Figure 3).

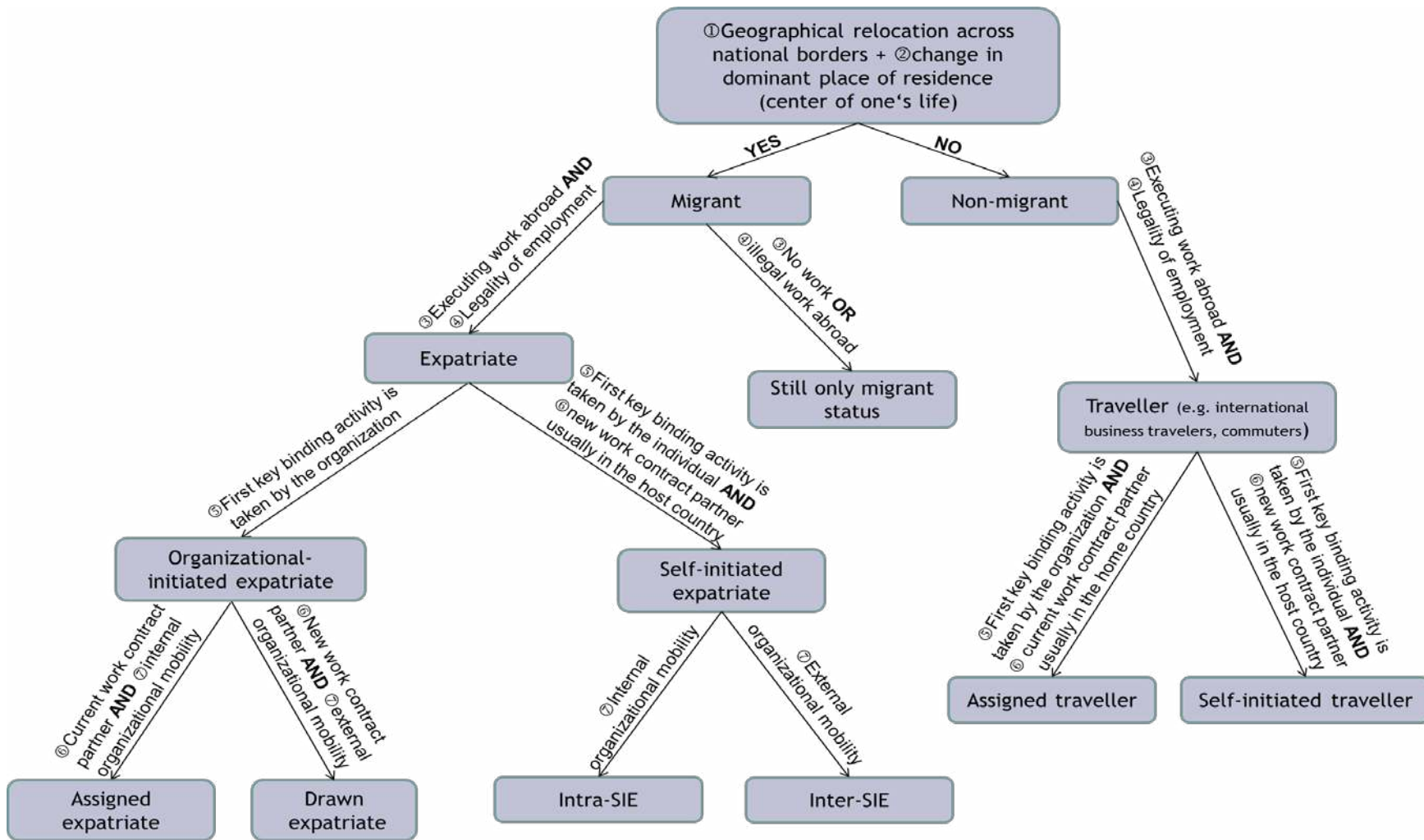


Figure 3: Decision tree

### ***2.5.1 Distinguishing migrants from non-migrants***

Figure 3 depicts the various considerations to distinguish migrants from non-migrants, migrants from expatriates and in turn, SIEs from AEs.

The following Arabic numerals relate directly to the seven criteria indicated in Figure 3. The first two criteria to distinguish migrants from non-migrants are (1) geographical relocation across national borders and (2) change in dominant place of residence. A person is considered as a migrant if he moves from one geographical point to another geographical point (Agozino, 2000), crossing national borders (Boyle et al., 1998) and changes his dominant place of residence which is the center of a person's life (United Nations, 1998). Both criteria (1 and 2) must be considered to distinguish between migrants and non-migrants. According to the OECD Model Tax Convention (Art. 4(2)), the dominant place of residence can be defined in a four-step process called the 'tie-breaker rule' (Stuart, 2010). If the first criterion does not result in a plain demarcation of a person's dominant place of residence, the next criterion has to be considered. If the second criterion does not lead to a clear result, the third or fourth criterion should be used. First, an individual's center of life is usually (I) where the person's family (domestic partner or spouse, children) live. If this does not lead to a clear result then (II) the person's economic interests are considered (e.g. administration of property). Then, (III) the person's habitual abode is of interest, which is usually assumed to be where the person spends more than 183 days of the year. The last criterion is (IV) the person's nationality (e.g. as indicated in the passport) (Stuart, 2010).

### ***2.5.2 Classifying migrants and expatriates***

In addition to the two criteria demarcating migrants from non-migrants, two further criteria serve to identify expatriates as a subgroup of migrants. Both criteria (3 and 4) are necessary to clearly demarcate the two terms. The third criterion is (3) 'executing work abroad' (see Table 5 and Figure 3). First, a person can only be named AE or SIE if the person executes his work abroad. Therefore, individuals who move to a foreign country, i.e. crossing national borders and changing their dominant place of residence without taking up

work (such as dependents of expatriates, under-age children, non-working partners, or non-employed foreign students) can be categorized as migrants, but not as expatriates. The fourth criterion to demarcate between migrant and expatriate is (4) ‘legality of employment’ (see Table 5 and Figure 3). All the evaluated literature indicated that to be considered as an expatriate a person must have legal employment (e. g. Biemann & Andresen, 2010; Doherty et al., 2011; Suutari & Brewster, 2000). Hence, pursuing independent, legal work (e.g. as self-employed and/or owners of organizations) also qualifies individuals as expatriates (see Inkson et al., 1997; Stone & Stubbs, 2007). However, individuals working illegally in a foreign country are excluded from the expatriate category.

Summing up, our analysis of the literature shows that the term migrant is an umbrella term for all expatriates but that some migrants – those who do not work or who are illegally working – are not expatriates (Figure 3). Previous research, however, claimed that migrants and expatriates are two exclusive groups (Al Ariss, 2010; Baruch et al., 2010).

### **2.5.3 Distinguishing SIEs from AEs**

Three additional criteria, (5) ‘initiator of key binding activity’ (whether the initiative comes from the individual or the organization), (6) ‘change of work contract partner’ and (7) ‘internal versus external organizational mobility’ sufficiently differentiate between the terms AE and SIE. It is important to mention that these three criteria are necessary to distinguish AEs from SIEs.

When defining initiation in terms of a general, non-binding articulated interest in a foreign work experience, both types of expatriation can be individually and organizationally initiated (Harris & Brewster, 1999; Thorn, 2009). In the following, we focus on the initiation of a key binding activity. Since work-related stays abroad can be regarded as goal-oriented behavior (Spieß & Wittmann, 1999), the Rubicon model of action phases (see Figure 4; Gollwitzer, 1991; Heckhausen & Gollwitzer, 1987; Heckhausen & Heckhausen, 2010) helps to explain the difference between assigned expatriates and self-initiated expatriates in terms of the criterion ‘initiator of key binding activity’ (see Figure 3).

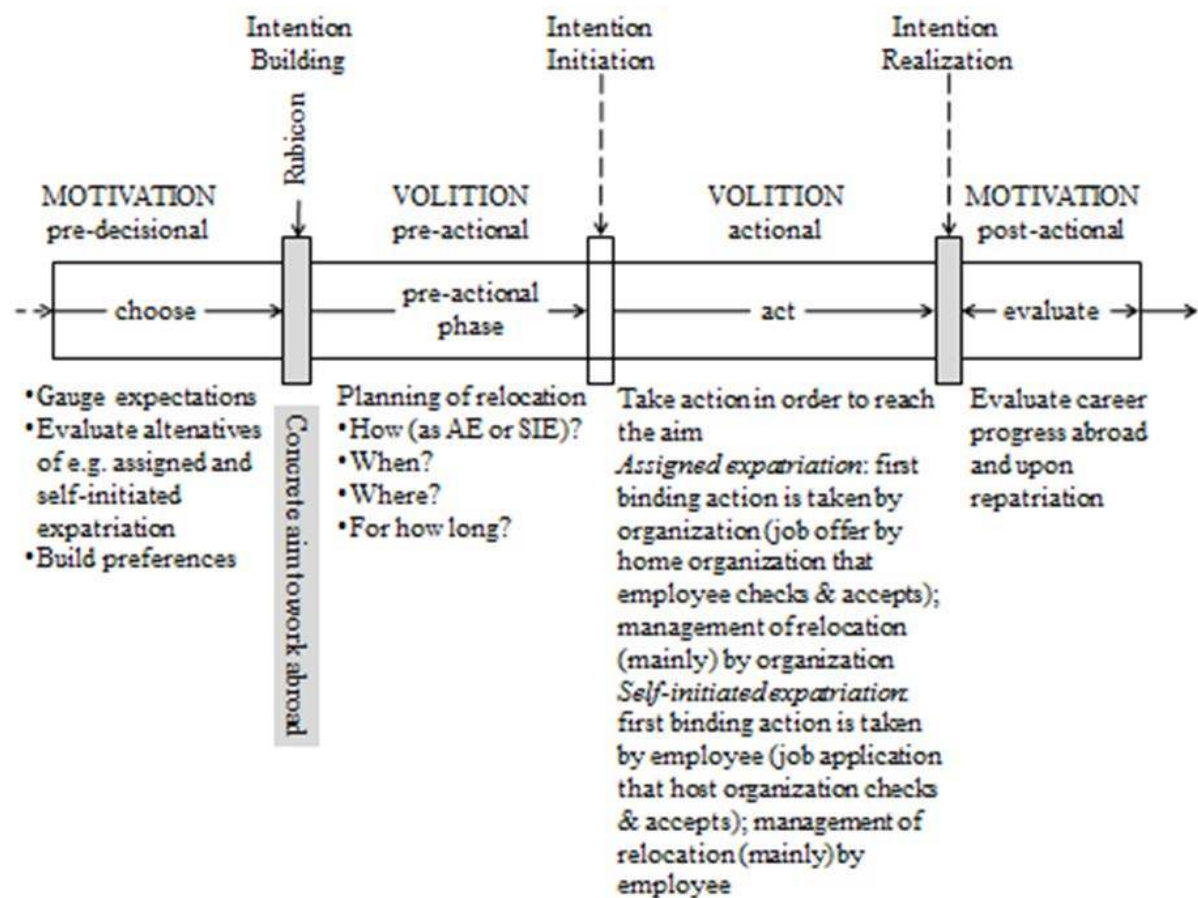


Figure 4: Rubicon model of action phases (following Heckhausen and Gollwitzer 1987; Heckhausen and Heckhausen 2010).

The model starts with the pre-decisional or deliberating phase, where alternatives are evaluated, preferences are built and motivation is formed. This means a person has a diffuse idea to work abroad and evaluates options such as assigned or self-initiated expatriation.

This process leads to what Heckhausen (1989) describes metaphorically as the crossing of the Rubicon, i.e. the development of a goal intention. This means that an employee develops the concrete intention to go abroad as, for example, a self-initiated expatriate, i.e. to apply for a job abroad on his own. The final decision is influenced by valence and expectancy parameters (Vroom, 1964). Since both AEs and SIEs decide for themselves to work in a foreign country (i.e. build their own goal intention), they do not differ at this point of the model.



The post-decisional phase can be subdivided into a pre-actional, an actional and a post-actional phase. In the pre-actional or planning phase, a definitive action plan is formed and intermediate goals are developed. In the case of a person who decides to go abroad as a SIE, intermediate goals would include the search for international job offers and the preparation of a palpable job application. A person who is eager to be assigned abroad might mention his interest to his superior. It is important to mention that no concrete action in terms of applying for a job abroad, in the case of SIEs, is taken at this point of the model; the planning is still without any engagement. This phase solely contains the planning of further action steps that might finally be realized in the action phase. Moreover, individuals protect the chosen intention (e.g. going abroad as SIE) from competing intentions.

In the following action phase, differences between AEs and SIEs become apparent. In the case of AE, an employee receives a formalized job offer for a position in a foreign subsidiary by his current work contract partner. The employee needs to check and accept or reject this offer. Thus, the first key binding activity is taken by the organization, i.e. the current work contract partner. In the case of SIE, by contrast, the employee himself applies for a foreign job. Thus, the first key binding activity is taken by the individual. The new work contract partner abroad, either in the same organization (Intra-SIEs) or in a new organization (Inter-SIEs), checks the application and acts on it. Both alternatives lead to a realization of the goal intention, i.e. the conclusion of a contract, followed by the management and implementation of the specific assignment (mainly) by the current work contract partner. Since SIEs might face more obstacles in the action phase than assigned expatriates (e.g. in terms of financial challenges, resulting in negative emotions such as fear or uncertainty) these individuals need a stronger volition, such as self-regulation strategies and discipline, in order to reach their goal to work in a foreign country (Doherty & Dickmann, 2013).

Finally, the post-actional phase is when an action is completed. Outcomes of actions, e.g. in terms of career progress while working abroad and/or after repatriation to the home country, are evaluated by the individual. Success or failure judgments are often accompanied by emotions; positive (e.g. pride) or negative (e.g. anger), reinforcing or hampering similar action in the future (Weiner, 1985).

The remaining two criteria, ‘change of work contract partner’ and ‘internal versus external organizational mobility’, depend on who takes the final decision to employ the expatriate abroad. For AEs this decision is usually taken in the home country. In contrast, the final decision to employ SIEs is made by a new work contract partner, usually in the host country. This new work contract partner is either the same organization (Intra-SIE) - internal organizational mobility to a foreign subsidiary - or a new organization (Inter-SIE).

#### ***2.5.4 Distinguishing migrants and expatriates from travellers***

A person who moves to another geographical point and crosses borders without changing his dominant place of residence (i.e. center of his life) is not considered to be a migrant (see Figure 3). For instance, ‘International Business Travellers’ (IBTs) can be excluded from the migrant category as IBTs frequently move between different countries without changing their dominant place of residence, e.g. the family or partner remains in the home country (Collings et al., 2007; Welch, Welch, & Worm, 2007). IBTs do not belong to the category of expatriates in the narrower sense.

As the decision of employment is made by the home organization and the first formalized action (offering an IBT a contract) is taken by the organization, an IBT belongs to the category of assigned travellers. In addition, cross-border commuters regularly move between different geographical points, crossing national borders, in order to get to their place of employment without changing their place of dominant residence (Knowles & Matthiesen, 2009). Summing up, all international workers who are located on the right side of the decision tree (see Figure 3) do not belong to the umbrella category migrant or expatriate. We denominate these groups such as IBTs and commuters as ‘travellers’.

## **2.6 Discussion: four types of AEs and SIEs**

In the literature and research, several forms of expatriates are distinguished such as assigned and self-initiated expatriates. However, the categorization described above is limited to the distinctions made so far in literature. Additional concepts may be missing as

they are either not (yet) operationalized in literature or have not been included in the sample of articles. One group to be mentioned that has received less attention in research so far are self-employed expatriates who belong to the group of SIEs. This limitation allows us to move beyond the normal ‘discourse’ on migration and expatriation just as Bartlett and Ghoshal’s definition of a global, international or transnational company is much more precise than the normal discourse in newspapers, magazines and many academic articles (Bartlett & Ghoshal, 1989).

Based on the analysis of existing definitions and demarcations of terms, research gaps become obvious. Figure 5 provides a typology of four different types of international employees: Inter-SIEs, Intra-SIEs, AEs and a new category named ‘drawn expatriates’ (DEs).

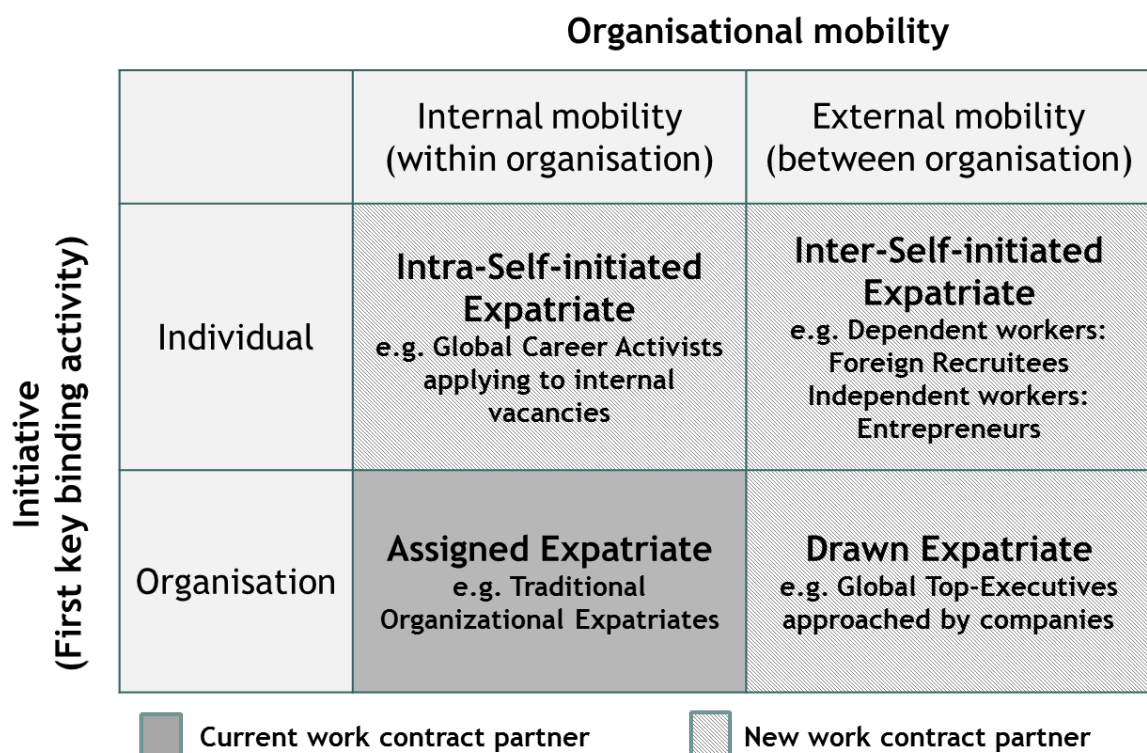


Figure 5: Typology of internationally mobile employees

We have argued that, in the case of SIEs, the initiative always comes from the individual and that the decision to employ an SIE is always made by a new work contract partner. In contrast, an AE is initiated by the current organization that takes the first key binding action by offering an employment contract for a temporary work assignment abroad. This process tends to uphold the legal anchor to the current work contract partner in the home country.

From this analysis, it becomes obvious that an additional group of mobile employees needs to be distinguished: individuals who are offered a job from an organization outside of their current country (6) (new work contract partner), e.g. based on their networks and/or reputation, without having applied for the position in question. An example of a DE could be a top executive being approached by a prospective employer who outlines a job offer. The person in question would clearly be mobile between organizations (7) (external organizational mobility) and change country and work contract partner. Both criteria (6 and 7) are necessary to differentiate DEs from the other three forms of international mobile employees. Moreover, considering the Heckhausen model of action phases (see Figure 4), the initiative in terms of a first key binding action is taken by the new organization offering an employment contract. Hence, in contrast to AEs, the final decision to employ the expatriate is made by a new work contract partner in a foreign country. It is obvious that research on DEs is hitherto underdeveloped.

## **2.7 Conclusions**

Overall, our research identified that seven demarcation criteria are sufficient for plain differentiation between the terms AE, DE, SIE and migrant, while the other discussed criteria found in the literature do not provide a satisfactory distinction (e.g. organizational support):

- (1) Move from one geographical point to another via crossing national borders (yes/no)
- (2) Change of dominant place of residence which is the center of a person's life (yes/no)
- (3) Execution of work in the form of dependent or independent employment (yes/no)

- (4) Legality of employment (legal vs illegal)
- (5) Initiator of key binding activity in job search (organization vs individual)
- (6) Work contract partner (current vs new)
- (7) Organizational mobility (internal vs external)

Based on these criteria, the terms AE and SIE are defined as follows:

An expatriate is an individual who moves to another country while changing the dominant place of residence and executes legal work abroad. As such, the expatriate has migrant status.

In the case of SIEs, the first key binding activity to move internationally is solely made by the individual who initiates the expatriation. The legal decision of employment is made by a new work contract partner - either a foreign unit of the organization where the SIE is currently employed (Intra-SIEs) or a new organization abroad (Inter-SIEs).

In the case of AEs, the first key binding activity to expatriate is taken by the organization and the legal decision of employment is made by the current work contract partner, usually in the home country. Organizational mobility of AEs is internal.

In the rare case of DEs, the host country organization (new work contract partner) approaches the individual and offers a legal employment contract leading to external organizational mobility.

Our findings have crucial theoretical and operational implications for future expatriation research. First, our distinction allows the creation of a much more precise and nuanced categorization of internationally mobile persons. It helps to distinguish whether individuals are migrants or not and clearly demonstrates that all expatriates are included in the group of migrants. In so doing we have been able to challenge currently available models on the demarcation of the terms SIE, AE and migrant (Al-Ariss, 2010; Baruch et al., 2013).

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Second and related, our definition allows an easier categorization and measurement than was possible before. For instance, Al-Ariss (2010) uses criteria such as geographical origin and destination of the international mobility, the period of stay abroad and the forced or chosen nature of the international move to distinguish migration from expatriation. Many of these or other criteria, such as the mindset of people whether they want to return to their country-of-origin, are open to different interpretation and the setting of different thresholds (e.g. are people who have been employed in a foreign country for 10 years expatriates or migrants in their frameworks?). Using clear distinctions, such as the ‘tie-breaker rule’ (Stuart, 2010) outlined above, to distinguish migrants from non-migrants and the criteria of legal employment to distinguish expatriates from non-expatriates (‘mere’ migrants) allows easier and high-quality categorizations.

Suutari and Brewster (2000) were one of the first who recognized that SIEs “are not a homogeneous group” (p. 430). A third contribution of this article is that by using our refined insights regarding initiative, researchers are able to more clearly define if their sample consists of AEs or SIEs. We distinguish between Intra-SIEs and Inter-SIEs. This distinction is relatively neglected in research design so far with the consequence that often all company-sponsored expatriates are treated as AEs while they might be Intra-SIEs (e.g. Dickmann, Doherty, Mills, & Brewster, 2008). Given the differences that begin to emerge in relation to the motivations and career impact of AEs versus SIEs (Doherty et al., 2011), distinguishing clearly between the two forms will be crucial for future research. Bearing this important distinction in mind could serve to explain existing heterogeneous results on expatriates and to facilitate interpretation of future research results.

A fourth contribution is the identification of a neglected category of expatriates. DEs – e.g. board members of global firms who are offered jobs based on their networks and track-record/reputation rather than having to apply for specific positions – have not, to our knowledge, been identified or researched in the literature. In addition, we lack research insights on difficult-to-access populations such as Inter-SIEs pursuing independent work - e.g. foreign entrepreneurs.

These insights, especially if these were to be taken up by researchers, can give rise to a range of management contributions. In their studies, using a self-reported measure of

whether expatriates see themselves as self-initiated or assigned, Biemann and Andresen (2010) as well as Doherty et al. (2011) outline distinct motivators and career patterns of SIEs and AEs. Future research that makes a clear distinction between these types of expatriates may not only be a better basis to integrate the findings, but it may also give better insights for organizations developing HR policies aimed at foreign workers. For instance, corporate branding strategies, recruitment targets, selection criteria and on-boarding activities may be geared to the different populations (Andresen & Biemann, 2013; Howe-Walsh & Schyns, 2010; Doherty & Dickmann, 2013). Dickmann and Baruch (2011) argue that superior information on SIEs will allow companies to develop more sophisticated and targeted talent, performance, career and retention management. Given that our distinctions should enable more nuanced research findings, further managerial contributions should emerge.

### ***2.7.1 Limitations of the study***

Some limitations restrict the validity of our research results. First, the database for AEs and migrants was constrained to 10 sociological, business and psychological journals, considering all publications in the period from 2005 to 2010. Especially, the term migrant has a long tradition in the sociological field of research (Millar & Salt, 2007), so our database does not include older definitions of the term migrant and other forms of scientific publications such as monographs. However, the primary goal of this present study was to outline the current state of research concerning the definition of the terms AE, SIE and migrant. A second limitation is caused by the fact that many definitions did not contain all of the defined demarcation criteria, resulting in a high level of missing values and low frequencies of characteristics. Still, this is also a result, eventually revealing that a special criterion (e.g. visa status) is not important to define the term (e.g. SIE or AE).

A further limitation may be our choice of using clear-cut and often legal categories to distinguish the different forms of living abroad (migration) and working abroad (SIEs, AEs or DEs). This does not take account of psychological processes and time implications. Development over time is difficult to capture and there are still some thorny questions to clarify. Imagine individuals who were self-initiated students on a degree course abroad and during the study period took up an internship in a holding company where another unit then

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offered them a job on completion of the degree without a formal application being made. These transitions (first being a migrant, then a self-initiated expatriate moving to be a drawn expatriate) are difficult to capture but we believe that our framework allows for greater clarity. It does mean, however, that individual careerists can change their legal status. The psychological developments that these students (or any other expatriates) go through and their career patterns working abroad are important to research, but are not part of our categorization mechanism. The reasons are linked to the parsimony of criteria and our strive to use clear, unambiguous categorization criteria.

Even though our categorization is likely to bring more clarity to the international mobility area, we are aware that our expatriate types encompass many different workers. AEs, DEs, Intra-SIEs and Inter-SIEs can pursue a large range of activities (university professors, UN peacekeepers, agricultural laborers). More work may be undertaken to refine these categories even further. We are aware that our framework might not be exhaustive; meaning that in practice there might be other types of international mobility which have not yet been identified. We perceive this framework to be a model that is flexible enough for adaptation in the future. For instance, we have identified 'DEs' in the research process and integrated them into the existing framework.

We also acknowledge a discourse limitation. Much of the popular literature seems to distinguish migrants from expatriates while our definition stipulates that all expatriates are migrants. This is akin to the Bartlett and Ghoshal (1989) typology of multinational enterprises (MNEs) clearly defining global as highly standardized MNEs while popular discourse uses global in the sense of firms operating in many countries. While it might be hard to overcome the preconceptions of some readers, our definitions should add more clarity and nuance to the understanding of non-migrants, migrants and within these AEs, DEs, Intra-SIEs and Inter-SIEs.

### ***2.7.2 Implications for further research***

Future research should provide empirical proof for our demarcation model and test whether the different subgroups can be plainly distinguished by the identified criteria.



Besides, future research could build on our study to try to find further differences between AEs and SIEs. For instance, further research on the ‘motive’ criterion for going abroad is necessary as most of the studies do not reveal major differences so far (Doherty et al., 2011). An important area of research that could serve to sufficiently demarcate the above-mentioned terms is the field of tax law, particularly whether the assessment takes place in the home or host country (Endres Spengel, Elschne, & Schmidt, 2005). So far insufficient research has been conducted on this issue (Egner, 2012).

Currently, many nations define the term migrant differently. Due to this inconsistency, a person might have migrant status in one country but not in another (e.g. the German definition of immigrants is based on nationality whereas in the Netherlands immigrant status depends on the country of birth of the individual and his parents (Euwals, Dagevos, Gijsberts, & Roodenburg, 2010). The criteria presented here could serve as a basis for a classification of the different samples found in research studies, in order to determine what kind of subgroups of international movers were included in the migrant category and to better understand and interpret the results found.

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### **3 Should I stay or should I go? A systematic literature review about the conceptualization and measurement of international relocation mobility readiness**

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#### **3.1 Abstract**

Employees' motivation to relocate abroad plays a crucial role for the success or failure of expatriate assignments. Hence, companies should consider employees' international relocation mobility readiness (IRMR) when selecting candidates for international postings. However, past research has conceptualized and measured IRMR heterogeneously, hampering the interpretation and comparability of IRMR research results. Based on business, psychological and sociological literature this article reviews and categorizes how IRMR has been conceptualized and measured. To structure the findings, we apply a directed content analysis. The sample comprises 84 journal articles. Our results reveal that studies seldom provide a conceptualization of IRMR. While we often find a misfit between the studies' explicit conceptualization and the actual measurement of IRMR, most scales actually measure willingness (i.e. normally a predictor of risky and spontaneous behavior). Based on our results and the Rubicon model of action phases (Heckhausen & Gollwitzer, 1987), we recommend future research to conceptualize IRMR as a dynamic multidimensional construct, covering the different phases of an individual's decision to relocate internationally. Future IRMR measurements should also cover the complexity of IRMR, e.g. regarding specific location characteristics. Finally, we outline implications for expatriate management (e.g. expatriate selection processes).

**Keywords:** International relocation mobility readiness, migration intention, expatriation willingness, willingness to relocate abroad, literature review

### 3.2 Introduction

In times of increasing global activities of companies, international mobility has become an ordinary step in many individual careers and often is perceived as a necessary precondition for career advancement, e.g. for obtaining certain leadership positions (De Cieri & Dowling, 2012; Haines, Saba, & Choquette, 2008). According to Pinto, Cabral-Cardoso and Werther (2012), the risk to suffer from career detriment might push employees to accept international assignments, although their true willingness to relocate abroad is low. These results indicate that sending originally unwilling employees abroad can result in cultural adjustment problems, less job satisfaction and the intention to terminate the assignment.

Expatriate failure is not only associated with high direct and indirect costs for the organization (Vögel, van Vuuren, & Millard, 2008), but can also lead to high psychological costs for the expatriate (e.g. loss of self-confidence; cf. Kassar, Rouhana, & Lythreatis, 2015). Research has identified problems in the expatriate selection process, the pre- and post-departure training process and repatriation efforts as crucial reasons for expatriate failure (Ko & Yang, 2011; Stone, 1991; Yeaton & Hall, 2008). A recent survey reveals that the assessment and selection of expatriate candidates is one of the three areas MNCs worldwide want to improve in (CARTUS, 2014). Tungli and Peiperl (2009) show that many U.K. and U.S. companies still select expatriate candidates primarily based on their technical skills. However, prerequisites for expatriate performance are not only abilities (e.g. technical or intercultural) and opportunities (e.g. international assignment offer), but also the motivation to relocate abroad (Appelbaum, Bailey, Berg, & Kalleberg, 2000). Moreover, MNCs worldwide seldom apply formal procedures to select candidates for international postings (e.g. by applying standardized scales; cf. Brookfield GMAC, 2016). Future expatriate selection can be optimized by applying valid and reliable scales to distinguish those employees that exhibit a high motivation to relocate abroad from those just pretending to be motivated (e.g. because of career reasons; cf. Remhof, Gunkel, & Schlägel, 2013).

Similar to the range of different terms that exist to describe *international relocation mobility readiness (IRMR)*, definitions and conceptualizations of IRMR differ vastly across and within scientific disciplines (e.g. Becerra, 2012; Kim & Froese, 2012). While the management literature describes the construct as ‘*willingness* to accept an international

assignment offer' (e.g. Mignonac, 2008), the sociological research discipline focuses on 'migration *intention*' (e.g. Hughes & McCormick, 1985; Sandu & De Jong, 1996). Both psychological constructs have different implications for the meaning of IRMR and hence must be distinguished clearly: In contrast to individuals who 'intend' to relocate abroad, individuals who are 'willing' to relocate abroad have not yet planned nor considered a concrete international relocation (Remhof, Gunkel, & Schlägel, 2014). Willingness reflects individuals' anticipation of how they would react if confronted with the opportunity to perform a specific behavior, e.g. an international assignment offer (Pomery, Gibbons, Reis-Bergan, & Gerrard, 2009). Consequently, there is a lack of clarity and consistency regarding the definition and conceptualization of the IRMR construct (cf. Remhof et al., 2014).

Considering to work abroad implies a lot of complex decisions and planning for the individual (Remhof et al., 2014). Several individual, social, organizational, job- and career related as well as location-specific factors influence this process (e.g. Andresen & Margenfeld, 2015; De Eccher & Duarte, 2016; Dickmann, Doherty, Mills, & Brewster, 2008). Many studies refer to the theory of planned behavior (TPB; Ajzen, 1991) to categorize IRMR as a behavioral intention (e.g. Boies & Rothstein, 2002; Froese, Jommersbach, & Klautzsch, 2013; Konopaske, Robie, & Ivancevich, 2009). The TPB also considers nonvolitional or external influences (e.g. organizational support) on an individual's intention (cf. Ajzen, 1991) and thus seems to be suitable to explain IRMR within its theoretical network (cf. Remhof et al., 2014). However, the TPB reflects just one phase (i.e. intention) of an individual's complex decision to relocate internationally (cf. Perugini & Bagozzi, 2001; Heckhausen & Gollwitzer, 1987). It is questionable, whether previous studies have already considered the complexity of the decision to relocate abroad within their conceptualization of IRMR. Consequently, we derive the following research question:

***RQ1:** Which psychological conceptualization best reflects the complexity of the IRMR construct?*

Regarding the measurement of IRMR, many studies apply general questions such as 'Do you intend to migrate?' (Mullet & Neto, 1991b, p. 41; see also Sandu & De Jong, 1996) or very specific questions such as 'I would move to another city for a better job' (Dette & Dalbert, 2005, p. 1726; Landau, Shamir, & Arthur, 1992; Neto & Mullet, 1998), ignoring



several other pull factors such as location attractiveness (e.g. Dickmann, 2012) or professional development (e.g. Dickmann et al., 2008) that could influence employees' IRMR. Moreover, many IRMR scales assess just one dimension of an individual's decision to move abroad (e.g. intention; cf. Hadler, 2006). As noted above, the decision to relocate abroad is more complex, which should also be reflected in the measurement of IRMR. Thus, we deduce the following research question:

***RQ2: Which measurement best reflects the complexity of the IRMR construct?***

To answer these questions, we will review, analyze and compare existing conceptualizations and measurements of the IRMR construct. The results of this paper are valuable for research and practice in international human resource management. First, past research has focused on expatriates' abilities (e.g. Templer, 2010) and opportunities (e.g. Cerdin & Le Pargneux, 2009). This article focuses on employees' motivation to relocate abroad as a major prerequisite for expatriate performance abroad (cf. Appelbaum et al., 2000). Second, we contribute to the interpretation and comparability of future research results on IRMR by showing how to best conceptualize and measure the IRMR construct.

Our results are of particular relevance for MNCs as to improve and systematize their expatriation selection and development processes (Brookfield GMAC, 2016). Based on our recommendations on IRMR measurement, companies can optimize their selection of expatriation candidates by applying those IRMR scales that were proved to be both valid and reliable. Moreover, relying on IRMR measures that cover a range of influencing factors of IRMR, companies can identify employees' motives or barriers and adjust the conditions for international mobility (e.g. kind of organizational support; McNulty, 2012) as well as developmental actions (e.g. training of expatriates; Romero, 2002) accordingly.

The remainder of this paper is organized as follows: First, we briefly define IRMR and introduce the different conceptualizations of IRMR. Second, we describe the methodologies applied to review and analyze existing conceptualizations and measurements of IRMR. Third, we present and discuss the results of the literature analysis and deduce recommendations for future conceptualizations and measurements of IRMR. Finally, we conclude with practical implications as well as limitations and provide suggestions for further research.

### 3.3 Defining and conceptualizing IRMR

Several different definitions of the IRMR construct exist (e.g. Mol, Born, Willemsen, van der Molen, & Derous, 2009; Tharenou, 2008), which often remain imprecise regarding important characteristics of IRMR (e.g. kind of international mobility or stability). For instance, Froese et al. (2013) define expatriation willingness as “the likelihood of an employee accepting a job offer, which requires living and working in a foreign country” (p. 3248). The terms ‘living and working’ imply that they focus on work-related international mobility. However, many different forms of work-related international mobility exist, such as international business travels or long-term assignments, which are related to different challenges for the individual (cf. Tharenou, 2015). Hence, precision regarding the kind of international work-related mobility IRMR focuses on is necessary. In our understanding, IRMR subsumes those kinds that require an international relocation, i.e. a change of an individual’s dominant place of residence when moving abroad (cf. Andresen, Bergdolt, Margenfeld, & Dickmann, 2014). Additionally, IRMR only covers forms of *international relocation mobility (IRM)* that require a long-term or permanent residential in the host country (e.g. assigned - / self-initiated expatriates and global managers, cf. Andresen, Biemann, & Pattie, 2015; Tharenou, 2015). However, IRMR excludes forms that require international relocation on a frequent and temporary basis such as rotational assignments (cf. Collings, Scullion, & Morley, 2007), or that do not involve a relocation (e.g. international business travels; cf. Welch, Welch, & Worm, 2007).

While several psychological constructs (e.g. desire, intention) have already been applied to conceptualize IRMR (e.g. Lu, 1999; Mignonac, 2008), the distinction between these constructs is not always clear (Remhof et al., 2014). The TPB (Ajzen, 1991) assumes that an individual’s decision to engage in a specific behavior (e.g. international relocation) is the result of a goal-oriented process, in which different behavioral options and its consequences are evaluated. The TPB has often been applied to conceptualize IRMR as an intention and predictor of goal-oriented behavior (e.g. Andresen & Margenfeld, 2015; Remhof et al., 2014). However, several meta-analyses have shown that the TPB only explains a moderate amount of variance in goal-directed behavior (e.g. Armitage & Conner, 2001; Webb & Sheeran, 2006). Perugini and Bagozzi (2001) question the sufficiency of the

TPB and show empirically that an extended model ('model of goal-directed behavior', MGB) with added components such as desires explains more variance in goal-directed behavior than the original TPB.

While *desires* can be defined as "a state of mind whereby an agent has a personal motivation to perform an action or to achieve a goal" (Perugini & Bagozzi, 2004, p. 71), *intentions* can be described as "the degree to which a person has formulated conscious plans to perform or not perform some specified future behavior." (Warshaw & Davis, 1985, p. 214). According to Bagozzi (1992) desires have to be integrated within the TPB as they add the motivational component to the model, by explaining how intentions become energized. For example, an employee might intend to relocate abroad, although he has no desire to do so, as he fears negative consequences for his career when rejecting the international assignment offer. Desires are rather abstract and undetermined with regard to the time frame for action implementation (e.g. at some time point in my career). In contrast, intentions include a specified time-frame when the action takes place (e.g. in the next six months). For instance, a person can have a desire to implement a specific behavior (e.g. to change his or her job), however must not necessarily have an intention to act on this desire (e.g. plan to change his job in the near future). While desires are deliberated in the first phase of decision-making, intentions reflect the end product of this deliberating phase (cf. Perugini & Bagozzi, 2004; see also Heckhausen & Gollwitzer, 1987). Several empirical studies have shown that desires and intentions are both important antecedents of goal-directed behavior (e.g. Dholakia, Bagozzi, & Gopinath, 2007; Tam, Bagozzi, & Spanjol, 2010).

The predictive strength of the TPB can be further optimized by integrating behavioral *expectations*, either as supplement or substitute of intentions (Pomery et al., 2009; Warshaw & Davis, 1985). Behavioral expectations are "individual's estimation of the likelihood that he or she will perform some specified future behavior" (Warshaw & Davis, 1985, p. 215). Both intentions and behavioral expectations involve an elaboration of the behavior and its consequences. While intentions include plans how to realize future goals and behavior, expectations focus on predicting the likelihood of some future behavior. According to Warshaw and Davis (1985) individuals take more and also nonvolitional influencing factors into account when making expectations about some future behavior such as unplanned changes to their intention, environmental factors and ability limitations. In contrast to

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intentions, individuals can make expectations without being committed to a specific goal (e.g. the goal to live and work abroad in the next year). Thus, behavioral expectations explain rational as well as non-rational behaviors (Warshaw & Davis, 1985). To give an example, an employee might have no concrete plans to relocate abroad, however realizes that he will likely accept an international assignment offer in the future, as international mobility is a necessary precondition to reach the next career level within his organization (cf. Pomery et al., 2009). In this example, nonvolitional factors such as organizational norms influenced the employee's expectation about his future behavior, although he has a low intention to perform this behavior.

Not all human behaviors are planned or directed towards a goal (Pomery et al., 2009). In contrast to desires, intentions and expectations, the *willingness* to implement a particular behavior is neither reasoned nor rational. In general, behavioral willingness can be defined as “an individual's openness to opportunity, that is, his willingness to perform a certain behavior in situations that are conducive to that behavior.” (Pomery et al., 2009, p. 896). Within the context of international mobility, willingness reflects the anticipation of how the individual might react if confronted with an international relocation offer (e.g. an international assignment). Contrary to individuals who intend to relocate abroad, individuals who are willing to relocate abroad have not yet planned nor considered an international relocation (Remhof et al., 2014). While behavioral expectations focus on a time frame in the future and can predict rational as well as non-rational behavior, behavioral willingness is more abstract by asking individuals how they would react in a specific and time-independent situation (cf. Pomery et al., 2009). Several studies have shown that willingness is a strong predictor for different kinds of behavior (e.g. Gerrard et al., 2006; Gerrard, Gibbons, Houlihan, Stock, & Pomery, 2008; Gerrard, Gibbons, Stock, Vande Lune, & Cleveland, 2005). The main differences between the four constructs are summarized in Table 6.

<b>Construct</b>	<b>Definition</b>	<b>Typical measure</b>
<b>Desire</b>	Diffuse wish to relocate abroad at some time point in the future.	<i>Do you wish to relocate abroad at some point of your career?</i>
<b>Intention</b>	Concrete plan to relocate abroad in the near future.	<i>Do you plan to relocate abroad in the next year?</i>
<b>Expectation</b>	Prediction or likelihood of an international relocation in the near future.	<i>How likely is it that you will relocate abroad in the next year?</i>
<b>Willingness</b>	Anticipation of hypothetical reaction if confronted with an international relocation offer (e.g. an international assignment)	<i>Suppose your company offers you the opportunity to send you abroad for a period of at least one year. How willing would you be to accept this international assignment offer?</i>

**Table 6: Distinguishing desire, intention, expectation and willingness (cf. Pomery et al., 2009)**

Summing up, many different conceptualizations of the IRMR construct exist. They should be precisely demarcated and defined. These different conceptualizations have different implications for the measurement of IRMR. To examine past conceptualizations and measurements of IRMR, we conducted a systematic literature review that we describe in the following section. Based on this literature review we will derive recommendations for future conceptualizations and measurements of IRMR.

### **3.4 Methodology**

In this section, we first describe our systematic search for literature. Then, we give details on the process of data analysis and present our criteria list.

### 3.4.1 Database

We conducted a systematic machine-based search of the literature on IRMR up to 2016, using business, psychological as well as sociological data bases (PsychInfo, EBSCO Host, and Social Sciences Citation Index). The scientific disciplines use different terms to describe IRMR (e.g. expatriation willingness, migration intention). We therefore carried out a broad search using key words from all three scientific disciplines: *migration*, *expatriation* and *relocation*, each combined with the search terms *readiness*, *willingness* and *intention* (e.g. expatriation AND willingness) (cf. Table 7). Migration and relocation can be both international or domestic. Nevertheless, we included these search terms due to the following reasons: first, we wanted to cover not solely business but also sociological articles on IRMR, analyzing whether both disciplines measure the same construct (e.g. the sociological literature often uses the term ‘migration intention’ instead of ‘expatriation willingness’ known from the business literature). Second, the term relocation (i.e. change of an individual’s dominant place of residence) is a crucial component of the IRMR construct. Hence, articles which focus on either migration or relocation must be considered. However, studies focusing *exclusively* on domestic mobility readiness were not included. Moreover, we will separately analyze the results for articles focusing explicitly on IRM to examine whether results are different if we focus on IRM only.

To ensure high quality, we consider theoretical and empirical studies published in English peer-reviewed journals only, i.e. book chapters or unpublished works were eliminated (cf. David and Han, 2004). Moreover, we scanned the reference lists of articles we identified through key-word search in order to cover all relevant publications on IRMR. Additionally, the five-year impact factor of the respective journals using the ISI-index was listed and considered in the interpretation of our results. We further ensured substantial relevance by requiring selected articles to contain at least (1) a definition / conceptualization of IRMR or (2) a measurement of IRMR. The final sample comprises 84 articles. Table 7 summarizes the key words, the searching conditions and the number of hits (before the filtering process) for all three data bases.

	<b>PsychInfo</b>	<b>SSCI</b>	<b>EBSCOHost</b>
<b>Searching conditions</b>	Peer-reviewed journals AND English AND All Text	Article AND English AND Topic <sup>2</sup>	Peer-reviewed journal AND English Journal AND Abstract
<b>Keywords<sup>3</sup></b>	<b>Total number of hits</b>		
Relocation AND readiness	10	15	6
Relocation AND willingness	47	96	52
Relocation AND intention	42	83	28
Migration AND readiness	16	4	9
Migration AND willingness	54	5	56
Migration AND intention	134	62	107
Expatriation AND readiness	4	4	5
Expatriation AND willingness	32	58	49
Expatriation AND intention	61	77	66

**Table 7: Total number of hits, key words and searching conditions for the three data bases**

<sup>2</sup> Due to the large number of hits, we applied the condition 'title' for the search term migration.

<sup>3</sup> Search terms were relocat\*, migrat\* and expat\* to cover verbs (e.g. expatriate) as well as nouns (e.g. expatriation).

### 3.4.2 Data Analysis

We used content analysis in order to analyze and compare the different conceptualizations and measurements of IRMR. In general, content analysis can be defined as “a research method for the subjective interpretation of the content of text data through the systematic classification process of coding and identifying themes or patterns” (Hsieh & Shannon, 2005, p. 1278). Weber (1990) recommends using both inductive and deductive procedures for content analysis. Hence, we applied the directed content analysis (Potter & Levine-Donnerstein, 1999), where coding starts with a theory which first criteria are deduced from and then allows for further criteria to emerge inductively from the data. The process of a directed content analysis entails the following steps: first, based on theories or past research we identify and define first coding categories (deductive approach); second, content that cannot be categorized by the existing coding theme is given a new code (inductive approach) (cf. Hsieh & Shannon, 2005). Following this directed approach to content analysis, we deduced the first criterion *conceptualization* (desire, intention, expectation and willingness) based on Perugini and Bagozzi (2001, 2004) as well as Pomery et al. (2009). During the coding process, seven further criteria were derived inductively from the material (*kind of mobility, relocation, reactivity, specificity, hypothetical situation, time frame, work-related mobility*).

Our units of analysis were definitions / conceptualizations of IRMR (i.e. explicit descriptions of the meaning of the construct) and measurements of IRMR (i.e. scales or sample items). For each of the 84 articles, we analyzed whether the scale measures the criterion (indicated by an ‘x’) or how the scale reflects the criterion (e.g. geographical or international mobility). Finally, we applied frequency analysis to identify patterns in our results, i.e. how strong the eight criteria are considered by the scales. Additionally, we collected information on the sample and method applied, the scale development process and reliability indicators (Cronbach’s Alpha). Finally, we evaluated each study and measurement according to its strengths and opportunities for improvement.



Criteria	Characteristics	Sample codings (i.e. sample items and coded text units in bold)
<b>1. Conceptualization</b>	<p><b>D</b> = desire</p> <p><b>I</b> = intention</p> <p><b>E</b> = expectancy</p> <p><b>W</b> = willingness</p> <p><b>E/W</b> = expectancy / willingness</p> <p><b>A</b> = attitude</p> <p><b>AB</b> = (subjective) ability</p>	<p><b>D</b>: ‘I <b>want</b> an international assignment <b>at some time in my career.</b>’ (Adler, 1986, p. 284)</p> <p><b>I</b>: ‘Do you <b>plan</b> to move away from Magdeburg/Freiburg <b>within the next 12 months?</b>’ (Kley, 2011, p. 467)</p> <p><b>E</b>: ‘Now, using the same scale as before where ‘0’ is absolutely no chance and ‘100’ means that it is absolutely certain, please tell me what you think are the <b>chances</b> that you will move <b>in the next 2 years?</b>’ (Bradley, Longino, Stoller, &amp; Haas III., 2008, p. 195)</p> <p><b>W</b>: ‘<b>Would you accept a job offer</b> that required a change of residence?’ (Ahn, Rica, &amp; Ugidos, 1999, p. 337)</p> <p><b>E/W</b>: ‘<b>Five years from now, would you prefer to be living</b> in this house (or apartment) or someplace else?’ (<i>prediction of one’s future behavior, but no ‘likelihood’</i>) (Lu, 1999, p. 472)</p> <p><b>A</b>: ‘The <b>adjective pairs</b> very good-very bad, very negative-very positive, pessimistic-optimistic, apprehensive-relaxed, and unhappy-happy were rated with reference to ‘your upcoming move.’ (Fisher &amp; Shaw, 1994, p. 215)</p> <p><b>AB</b>: ‘How <b>capable</b> do you consider yourself for an international career?’ (Mol et al., 2009, p. 10)</p>
<b>2. Kind of mobility</b>	<p><b>G</b> = geographical</p> <p><b>I</b> = international</p> <p><b>D<sup>4</sup></b> = domestic</p>	<p><b>G</b>: ‘If you could improve your work or living conditions, how willing or unwilling would you be <b>to move</b> to another neighbourhood or village?’ (Drinkwater &amp; Ingram, 2009, p. 297)</p> <p><b>I</b>: ‘How willing are you to accept an <b>international</b> assignment as your next posting?’ (Groeneveld, 2008, p. 39)</p> <p><b>D+ I</b>: ‘Plan to move from this area to settle permanently <b>in another area in South Africa or in another country</b>’ (Gubhaju &amp; De Jong, 2009, p. 41)</p>
<b>3. Relocation</b>	<p><b>R</b> = relocation</p> <p><b>WR</b> = without relocation</p> <p><b>N</b> = not specified</p>	<p><b>R</b>: ‘I am willing to <b>relocate</b> abroad for work’ (Tharenou, 2008, p. 190)</p> <p><b>WR</b>: ‘Be willing to accept the <b>traveling</b> global assignment.’ (Konopaske et al., 2009, p. 372)</p>

<sup>4</sup> Note: For our database, we considered articles that measure domestic mobility in combination with international or geographical mobility.

		N: 'What is the probability that you will eventually start an <b>international career</b> ?' (Mol et al., 2009, p. 10)
<b>4. Reactivity</b>	x = yes	'Would you <b>accept a job offer</b> that required a change of residence?' (Ahn et al., 1999, p. 337)
<b>5. Specificity</b>	<b>Rea</b> = reason <b>Loc</b> = location	<b>Rea</b> : 'I would leave (name of city) if a <b>better job opportunity</b> arose in another (name of state) city.' (Gould & Penley, 1985, p. 474) <b>Loc</b> : 'Respondents were asked to consider <b>forty-one different assignment locations</b> (listed alphabetically) and to indicate whether they would accept or reject the position.' (Lowe et al., 1999, p. 226)
<b>6. Hypothetical situation</b>	x = yes	'You have been asked to go for several years on an expatriate assignment for your company. The host country in consideration is an economically advanced country with a high standard of living and good modern infrastructure. As an advanced economy, the country has a well-structured and high-quality education system. The national language of the country is English. You can communicate with the local people in English.' (Kim & Froese, 2012, p. 3422)
<b>7. Time frame</b>	x = yes	'If you are given the opportunity to work in another port, <b>for at least a year or longer</b> , would you consider the move seriously?' (Kirschenbaum, 1991, p. 114)
<b>8. Work-related mobility</b>	<b>J</b> = job / work <b>IA</b> = international assignment <b>SIA</b> = short-term international assignment <b>LIA</b> = long-term international assignment <b>T</b> = traveling assignment <b>TN</b> = transfer <b>IM</b> = internal mobility (within the organization)	<b>J</b> : 'Would you accept a <b>job offer</b> that required a change of residence?' (Ahn et al., 1999, p. 337) <b>IA</b> : 'To what extent are you willing to accept <b>an assignment outside of Europe</b> , for a period of minimally one year?' (Schruijer & Hendriks, 1996, p. 545) <b>SIA</b> : 'Enthusiastically take a global assignment <b>lasting up to 1 year</b> .' (Konopaske et al., 2009, p. 372) <b>LIA</b> : 'Jump at the opportunity <b>for a 1-4 year global assignment</b> .' (Konopaske et al., 2009, p. 372) <b>T</b> : 'Be willing to accept the <b>traveling</b> global assignment.' (Konopaske et al., 2009, p. 372) <b>TN</b> : 'How likely are you to accept a <b>transfer</b> to a new geographic location?' (Challiol & Mignonac, 2005, p. 253) <b>IM</b> : 'the general intent to accept future relocation opportunities <b>within the organization regardless of the type of move</b> (e.g., temporary, lateral, or promotion)' (Eby & Russell, 2000, p. 50)

**Table 8: Final criteria list with coding details**

### 3.4.3 *Criteria list*

Next, we turn to the criteria list. Table 8 gives the final criteria, emerging characteristics and sample codings.

The first criterion distinguishes between different *conceptualizations* of IRMR. We analyzed whether the scale measures the intention, desire, expectation or willingness to relocate abroad (or another kind of psychological construct). For instance, a scale was classified as measuring an intention if it refers to a concrete, short-term time frame (e.g. Kley, 2011, cf. Table 8) and / or contains information on planning issues (e.g. time frame and destination of international relocation; cf. Paulauskaite, Seibokaite, & Endriulaitiene, 2010). Contrarily, unspecific or long-term time frames point to a desire (e.g. Adler, 1986, cf. Table 8). A scale measures an expectation, if participants have to estimate the likelihood that they will realize a specific behavior (i.e. international relocation) in the near future (concrete time frame; e.g. cf. Sergeant, Ekerdt, & Chapin, 2010). If participants are asked to anticipate how they *would* react in a given situation (e.g. if offered an international assignment), the scale was categorized as measuring willingness. Items were categorized as attitude if they contain an evaluation of international relocation mobility (e.g. Fisher & Shaw, 1994; cf. Table 8). A scale or item measures a (subjective) ability, if it asks, whether a person believes to be able to successfully relocate abroad (e.g. Mol et al., 2009).

The second criterion *kind of mobility* indicates whether the scale measures geographical mobility, subsuming domestic and international mobility, or international mobility alone. A scale was coded as international if it obviously measures international mobility (e.g. Groeneveld, 2008, cf. Table 8) or if we could deduce from the wording that national borders are crossed ('If they would move to the neighbouring country if they were offered an attractive job'; Gijssels & Janssen, 2000, p. 66).

*Relocation* means that the individual changes its dominant place of residence (Andresen et al., 2014). This criterion is either directly (e.g. Tharenou, 2008, cf. Table 8) or indirectly (e.g. 'Have you recently thought about moving away from Magdeburg/Freiburg to live somewhere else?'; cf. Kley, 2011, p. 476) expressed in IRMR scales. 'Be willing to accept the traveling global assignment.' (Konopaske et al., 2009, p. 372) is an example for

a scale measuring international mobility without relocation. A scale was classified as *reactive* if it measures an individual's reaction to a specific offer (e.g. international assignment) by an organization (cf. van der Velde, Bossink, & Jansen, 2005). If IRMR is bounded to specific reasons (e.g. 'I would move to another city for a better job. '; Dette & Dalbert, 2005, p. 1726) or specific locations (e.g. countries; cf. Lowe, Downes, & Kroeck, 1999) / location characteristics (e.g. standard of living; cf. Kim & Froese, 2012), we categorized the scale as *specific*. *Hypothetical situation* reflects a scale that describes a particular international mobility case (cf. Abraham, Auspurg, & Hinz, 2010). Some scales indicate the length of international mobility (e.g. 'Jump at the opportunity for a 1–4 year global assignment. '; cf. Konopaske et al., 2009, p. 372), thus were classified as measuring a specific *time frame*.

*Work-related mobility* was coded for scales that ask participants to indicate whether they are willing to relocate abroad for work reasons. In addition to the more traditional forms of work-related mobility (e.g. international assignments), several alternative forms of work-related mobility can be differentiated (e.g. self-initiated expatriates; cf. Andresen et al., 2015). 'Do you intend to migrate?' (Mullet & Neto, 1991b, p. 41) is an example of a scale which does not measure work-related mobility, as migration also subsumes phenomena such as trafficking that are not work-related (cf. Andresen et al., 2014).

### 3.5 Results

Table 9 shows the classification of the sample according to the eight criteria. First, we report the general results of all 84 articles under consideration. Afterwards, we give details on those articles which focus on international relocation mobility explicitly.

#### 3.5.1 Full sample analysis: 84 articles

In total, only 33 of 84 studies provide an explicit conceptualization of the IRMR construct (only 11 studies explicitly define the IRMR construct). In 27 of these cases, we found no match between the explicit classification and the actual measurement of the

construct. Most of the studies conceptualize IRMR as an intention (n=19). However, only two of these studies actually measure an intention (De Jong, Root, Gardner, Fawcett, & Abad, 1985; Hadler, 2006). While 38 of the 84 studies measure the willingness to relocate abroad (e.g. Ahn et al., 1999), we identified only a few cases in which a desire (n=16), an intention (n=4) or an expectation (n=8) are assessed. 16 studies measure a mixture of different constructs. For instance, Mol et al. (2009) apply an IRMR scale which can be subdivided into four different constructs (i.e. ability, desire, expectation and willingness). Eight measurements could not plainly be categorized as willingness or expectation as items contain elements of both constructs ('E / W'; e.g. van der Velde et al., 2005).

Looking at the strengths and opportunities for improvement regarding the first criterion, it becomes obvious that some studies thoroughly conceptualize IRMR. To give an example, Remhof et al. (2014) provide a clear distinction between IRMR (conceptualized as intention) and related constructs (i.e. willingness; see also Challiol & Mignonac, 2005). However, as indicated above, most studies do not give any information on the conceptualization of the IRMR construct or apply different constructs interchangeably. For instance, Tharenou (2008) describes IRMR as the “the degree to which an individual is motivated to expatriate for a job for a year or more” (p. 184), while stating that IRMR might also reflect an employee’s interest in an international career. Drawing on the psychological literature, interests can be defined as individual patterns of likes and dislikes (Mount, Barrick, Scullen, & Rounds, 2005), while a motivation describes the direction, intensity and persistence of goal-directed behavior (Heckhausen & Heckhausen, 2010). Both constructs differ largely regarding their meaning for IRMR and hence must be distinguished clearly.

Article		Scale / method / sample information						Conceptualization			Categories								Evaluation	
Authors	Journal	5-Year Impact Factor	Total amount of items	Method / Sample	Scale developed (SD)/ applied (SA) / + modified (SA+M)	Name of scale applied (+ modified)	Reliability (RE; Cronbach's Alpha)	Name of central construct	Definition of central construct	Conceptualization (as stated by Scholars) (CS)	1: Conceptualization (C)	2: Kind of mobility (KM)	3: Relocation (R)	4: Reactivity (RE)	5: Specificity (SP)	6: Hypothetical situation (HS)	7: Time frame (TF)	8: Work-related mobility (WM)	Strengths	Opportunities for improvement
<sup>1</sup> Abraham / Auspurg / Hinz (2010)	Journal of Marriage and Family	2.997	1	Interviews / N = 280 employed couples from Germany / Switzerland	NI			Willingness to move			W	G	R	x	Rea	x		J	HS described	No CS, SP (REA)
<sup>2</sup> Adler (1986)	International Journal of Intercultural Relations	1.826	5	Survey / N = 1129 students from American / Canadian MBA programs	SD		.85	Interest in IAs / int. careers			D	I	R+N					(J+IA)	SD described, RE ≥ .80	No CS, 1 Item not work-related
<sup>3</sup> Agadjanian / Nedoluzhko / Kumskov (2008)	International Migration Review	2.114	3	Survey / N = 1535 Asian individuals	NI			Migration intention		D+I	D	I	R				x		CS provided	RE not indicated, misfit CS / C
<sup>4</sup> Ahn / Rica / Ugidos (1999)	Economica	1.365	1	Panel / Spanish Labour Force Survey (EPA), N = 3585 individuals	NI			Willingness to move for work / migration attitude		I / W	W	G	R	x				J	CS provided	No clear conceptualization, misfit CS / C
<sup>5</sup> Andersen / Scheuer (2004)	International Business Review	3.095	1	Survey / N = 1346 Danish economists	NI			Attitudes toward foreign assignments			D	I	N					J		Two constructs, 1 Item ("Do you have wishes or plans [...]?" ), no CS
<sup>6</sup> Aryee / Wah Chay / Chew (1996)	Journal of Organizational Behavior	5.196	12	Survey / N = 228 Singaporean managers	SD		.93 / .95 (two sub-scales)	Willingness to accept an IA		W	W	I	R	x	Rea + Loc			IA	SD described, RE ≥ .90, fit CS / C, SP (Loc, cultural distance)	SP (REA)
<sup>7</sup> Becerra (2012)	International Migration	1.335	3	Survey / N = 755 Mexican students	NI			Migration intention			D	I	R+N		Rea + Loc					RE not indicated, no CS, SP (REA, 1 destination country)
<sup>8</sup> Bielby / Bielby (1992)	American Journal of Sociology	6.095	1	Interviews / QES (1977), N = 359 employed + married US couples	NI			Reluctance to relocate for a better job			W	G	R	x	Rea	x		J		"Reluctance" - same construct?, no CS, SP (REA)
<sup>9</sup> Boenisch / Schneider (2010)	Post-Communist Economies	0.760	1	Panel / German Socio-Economic Panel (GSOEP), N = 3600 individuals	NI			Mobility preferences or intentions			W	G	R		Rea			(J)		No CS, SP (REA)
<sup>10</sup> Boheim / Taylor (2002)	Scottish Journal of Political Economy	0.686	3	Panel / British Household Panel Survey (BHPS), N = 40117 individuals	NI			Desire to move			W	G	R							RE not indicated, no CS
<sup>11</sup> Boies / Rothstein (2002)	International Journal of Intercultural Relations	1.826	5	Survey / N = 350 Canadian managers	SA	Adler (1986)	.90	Interest in IAs		I / W	D	I	R+N					(J+IA)	RE ≥ .90, CS provided	No clear conceptualization, misfit CS / C
<sup>12</sup> Bradley / Longino / Stoller / Haas, III (2008)	Gerontologist	3.928	1	Panel / University of Michigan Health and Retirement Study (HRS), 1994-2002	NI			Migration intention		I	E	G	R						CS provided	Misfit CS / C
<sup>13</sup> Brett/Stroh (1995)	Human Resource Management	3.055	1	Survey / N = 405 US managers	SA+M	Brett & Reilly (1988)		Willingness to relocate internationally		I	D	I	R		Rea				CS provided	Misfit CS / C, SP (Rea)
<sup>14</sup> Caligiuri/Phillips (2003)	International Journal of Human Resource Management	2.061	2	Survey / N = 92 US employees	NI		.71 / .91 (pre / post)	Interest in IAs			D+E	I	R	(x)				IA	RE ≥ .90 (post-test)	No CS
<sup>15</sup> Carr / McWha / Mac Lachlan / Furnham (2010)	International Journal of Psychology	1.903	3	Survey / N = 1290 expatriate + local professionals from 6 different countries	SD		.92	Cognitions about international mobility			D	I	R						SD (factor analysis), RE ≥ .90	Not solely measuring cognitive construct, no CS
<sup>16</sup> Challiol / Mignonac (2005)	Journal of Organizational Behavior	5.196	1	Survey / N = 155 French employees	NI			Likelihood of accepting a transfer		E	W	G	R	x				TN	Good differentiation between intention and likelihood (BE)	Misfit CS / C

<sup>17</sup> De Echer / Duarte (2016)	International Journal of Human Resource Management	2.061	12	Survey / N = 515 engineers from France, Spain and Portugal	SA+SD	Noe / Barber (1993)		Willingness to accept an IA			W	I	R	x	Loc	x		IA	SD described, HS described, SP (Loc)	RE not indicated, no CS	
<sup>18</sup> De Jong / Root / Gardner / Fawcett / Abad (1985)	Population and Environment	1.885	2	Survey / The Philippine Migration Survey, N = 1340 Philippines	SA	1980 survey question		Migration intention			I	I	G	R		Loc			CS provided, fit CS / C, measuring intention	RE not indicated	
<sup>19</sup> De Jong (2000)	Population Studies	1.739	1	Survey / National Migration Survey of Thailand, N = 600 individuals	NI			Migration intention			I	D	G	R					CS provided	Misfit CS / C	
<sup>20</sup> Dette / Dalbert (2005)	Journal of Applied Social Psychology	1.414	18	Survey / N = 392 German students (midlevel secondary schools)	SA+SD	Dalbert (1999)	.81 / .83 (two scales)	Attitude toward mobility	x	A	W	G	R	(x)	Rea	(x)		J	SD described, RE ≥ .80, HS described	Misfit CS / C, SP (Rea)	
<sup>21</sup> Drinkwater / Ingram (2009)	Regional Studies	3.304	3	Panel / British Social Attitudes Survey (BSAS), N = 3633 individuals	NI			Willingness to move			W	G+D	R		Rea					RE not indicated, no CS, mix of geographic + domestic items, SP (Rea)	
<sup>22</sup> Duncan / Newman (1976)	Journal of the American Institute of Planners	NI	1	Panel / Michigan Panel Study of Income Dynamics, third - sixth waves	NI			Mobility expectations			E/W	G	R							No CS, item measures two constructs	
<sup>23</sup> Dupuis / Haines III / Saba (2008)	International Journal of Human Resource Management	2.061	41	Survey / 227 Canadian employed MBA graduates	SA+M	Lowe et al. (1999)	.96	Willingness to accept an IA			I	W	I	R	x	Loc	x	x	IA	RE ≥ .90, CS provided, SP (Loc), HS described	Amount of items, misfit CS / C
<sup>24</sup> Eby/Russell (2000)	Journal of Vocational Behavior	3.885	7	Survey / N = 872 employees	NI		.90	Employee willingness to relocate	x	I	W	G	R	x				IM	RE ≥ .90, CS provided	Categorization based on definition of construct	
<sup>25</sup> Edwards / Rosenfeld / Thomas / Thomas (1993)	Hispanic Journal of Behavioral Sciences	1.034	5	Survey / N = 1378 Hispanic, Non-Hispanic, White + Black individuals	NI			Willingness to move			W	G	R		Rea			J		SD not detailed, RE not indicated, no CS, SP (Rea)	
<sup>26</sup> Engle / Schlägel / Dimitriadi / Tatoglu / Ljubica (2015)	European Journal of Management	NI	3	Survey / N = 896 business students from Croatia, Germany, Russia, Turkey, USA	SA+M	Engle et al. (2010)	.84	Expatriation intention			I	D+E	I	N	(x)			J	RE ≥ .80, CS provided	Misfit CS / C	
<sup>27</sup> Epstein / Gang (2006)	Review of Development Economics	0.782	1	Panel / Hungarian Household Panel Survey, 1993-1994	NI			Desire to go abroad			D	I	N							No CS	
<sup>28</sup> Fidrmuc / Huber (2007)	Empirica	0.636	1	Survey / official survey (1998), N = 1075 individuals from Czech Republic	NI			Willingness to migrate			W	G	R		Rea	x		J		No CS, SP (Rea)	
<sup>29</sup> Fisher / Shaw (1994)	Journal of Organizational Behavior	5.196	5	Survey + Interviews / N = 116 US Air Force Officers	SD		.91 / .93 (time 1 / time 2)	Relocation (pre- / post-move) attitude		A	A	D+I	R						SD (factor analysis), RE ≥ .90, fit CS / C	Mix of domestic and international relocation	
<sup>30</sup> Froese / Jommersbach / Klautsch (2013)	International Journal of Human Resource Management	2.061	3	Survey / N = 232 German + N = 211 Korean students	SA	Mol et al. (2009)	.83 / .85 (G / K)	Expatriation willingness	x	I	AB	I	N						RE ≥ .80, CS provided	Misfit CS / C (sample item measuring "ability")	
<sup>31</sup> Gijsel / Janssen (2000)	Tijdschrift voor Economische en Sociale Geografie	1.172	1	Survey / N = 2203 highly educated Dutch + German employees	NI			Willingness to move to a neighbouring country			W	I	R	x	Rea					No CS, SP (Rea)	
<sup>32</sup> Gould / Penley (1985)	Academy of Management Journal	11.901	3	Survey / N = 192 US male employees	NI		.91	Willingness to relocate			W	G	R		Rea			J	RE ≥ .90	No CS, SP (Rea)	
<sup>33</sup> Groeneveld (2008)	Review of Public Personnel Administration	2.000	1	Survey / N = 871 Dutch dual-career couples	SA+M	Noe et al. (1988)		Willingness to accept an IA			E/W	I	R	x				IA		No CS, item measures two constructs	
<sup>34</sup> Gubhaju / De Jong (2009)	International Migration	1.335	4	Survey / Causes of Migration in South Africa Survey, N = 3306 individuals	NI			Intention to migrate / move			I	D+I	R		(Rea)	x	(J)		Measuring intention	RE not indicated, no CS, SP (Rea)	
<sup>35</sup> Hadler (2006)	European Societies	1.120	6	Survey / Eurobarometer survey (2001), N = 15792 individuals, 15 countries	NI			Intention to migrate / move			I	I	G+D+I	R		Loc			Fit CS / C, measuring intention	RE not indicated, mix of geogr., int. + dom. items	
<sup>36</sup> Haines / Saba / Choquette (2008)	International Journal of Manpower	1.060	41	Survey / N = 331 Canadian employed business school alumni	SA+M	Lowe et al. (1999)	.96	Willingness to accept an IA			I	W	I	R	x	Loc	x	x	IA	RE ≥ .90, CS provided, SP (Loc), HS described	Amount of items, misfit CS / C

<sup>37</sup> Heaton / Fredricksen / Fuguit/ Zuiches (1979)	Demography	3.577	1	Survey / NORC's Amalgam Survey (1974), US population > 18 years	NI			Migration intention			E	G	R							No CS
<sup>38</sup> Hughes / McCormick (1985)	Economic Journal	3.859	1	Panel / General Household Survey (GHS), UK, 1973-1974	NI			Migration intention			D	G	R							No CS
<sup>39</sup> Ivlevs / King (2015)	International Migration	1.335	2	Interview-survey / N = 1367 Kosovars	NI			Emigration intention			E+I	I	R						Measuring intention	RE not indicated
<sup>40</sup> Kan (1999)	Journal of Urban Economics	2.932	1	Panel / Michigan Panel Study of Income Dynamics (PSID), 1979-1987	NI			Mobility expectation			E/ W	G	R							No CS, item measures two constructs
<sup>41</sup> Kim/Froese (2012)	International Journal of Human Resource Management	2.061	6	Survey / N = 151 married Korean employees	SA+M	Mol et al. (2009); Noe et al. (1988)	.87	Expatriation willingness			W	I	R	x	Loc	x	x	IA	RE ≥ .80, HS described, SP (Loc)	SA+M (combination of existing scales to new scale) no CS
<sup>42</sup> Kirschenbaum (1991)	Journal of Urban Economics	2.932	1	Survey / N = 251 Israeli employees	NI			Transfer intent		I	W	G	R	x		x	x		CS provided, HS described	Misfit CS / C
<sup>43</sup> Kley (2011)	European Sociological Review	2.765	2	Panel / German Panel Study, N = 2410 individuals	NI			Migration intention		D+I	D+I	G	R						Conceptual framework (migration phases), fit CS / C	RE not indicated
<sup>44</sup> Konopaske / Robie / Ivancevich (2005)	International Journal of Human Resource Management	2.061	10	Survey / N = 427 US global managers (+ N = 167 spouses)	SA+M	Brett & Stroh (1995)	.87 / .88 (SIA / LIA)	Willingness to assume a global assignment			W	I	R	x			x	SIA+LIA	RE ≥ .80	No CS
<sup>45</sup> Konopaske / Robie / Ivancevich (2009)	Management International Review	2.732	15	Survey / N = 431 US global managers (+ N = 162 spouses)	SA+M	Konopaske et al. (2005)	.91 / .90 / .91 (T / SIA / LIA)	Willingness to assume T, SIA + LIA		I	W	I	R+WR	x			(x)	SIA+LIA+T	RE ≥ .90, CS provided	Misfit CS / C
<sup>46</sup> Konopaske / Werner (2005)	International Journal of Human Resource Management	2.061	10	Survey / N = 418 US global managers	SA	Konopaske et al. (2005)	.90 / .91 (SIA / LIA)	Willingness to accept a global assignment			W	I	R	x			x	SIA+LIA	RE ≥ .90	No CS
<sup>47</sup> Landau / Arthur / Shamir (1992)	Journal of Organizational Behavior	5.196	5	Survey / N = 1648 US managerial and professional employees	SD		.85	Willingness to relocate			W	G	R	(x)	Rea		(x)	J+IA	SD (factor analysis), RE ≥ .80	No CS, SP (REA)
<sup>48</sup> Lee / Chen (2012)	Economic Modelling	1.573	5	Survey / N = 297 graduating students (management college, university)	SA	Landau et al. (1992)	.90	Willingness to relocate			W	G	R		Rea		(x)	J+IA	RE ≥ .90	Incomplete sample information (nationality), no CS, SP (Rea)
<sup>49</sup> Liao (2001)	International Journal of Comparative Sociology	1.495	1	Survey / N = 2248 individuals from Pennsylvania / Taiwan	NI			Migration intention			E	G	R							No CS
<sup>50</sup> Lowe / Downes / Kroeck (1999)	International Journal of Human Resource Management	2.061	41	Survey / N = 217 US graduate + undergraduate business students	NI			Willingness to work overseas			W	I	R	x	Loc	x	x	IA	SP (Loc), HS described	Amount of items, SD (but no information), RE not indicated, no CS, SP (Rea)
<sup>51</sup> Lu (1998)	Environment & Planning A	2.180	1	Panel / American Housing Survey (AHS), 1985, 1987, 1989	NI			Mobility intention	x	D	E/ W	G	R						CS provided	Misfit CS / C, item measures two constructs
<sup>52</sup> Lu (1999)	Population and Environment	1.885	1	Panel / American Housing Survey (AHS), 1985, 1987, 1989	NI			Mobility intention	x	D	E/ W	G	R						CS provided	Misfit CS / C, item measures two constructs
<sup>53</sup> Markham / Pleck (1986)	Sociological Quarterly	2.274	1	Panel / Quality of Employment Survey, 1977/78, N = 1.515 US employees	SD			Willingness to move			W	G	R	x	Rea	x		J	HS described	No CS, SP (REA)
<sup>54</sup> McHugh (1984)	Professional Geographer	1.749	2	Survey / N = 167 US individuals	NI			Migration intention		I	E	G	R						CS provided	RE not indicated, mis fit CS / C
<sup>55</sup> Mignonac (2008)	International Journal of Human Resource Management	2.061	1	Survey / N = 584 French management level employees	SA	van der Velde et al. (2005)		Willingness to accept an IA	x	I	E/ W	I	R	x			x	IA	CS provided	Misfit CS / C, item measures two constructs



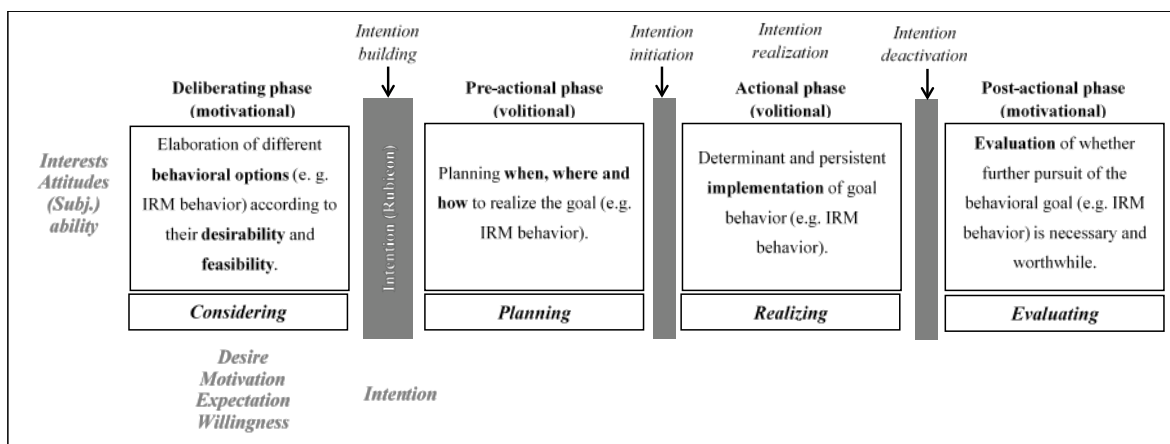
<sup>56</sup> Mol / Born / Willemssen / van der Molen / Derous (2009)	Human Performance	1.750	7	Survey / N = 299 final-year masters' students from two Dutch universities	SD		.87	Expatriation willingness	x	I	AB+D+E+W	I	R+WR+N	(x)	Rea	(x)	(J+IA+T)	SD described (+ factor analysis), RE ≥ .80, CS provided	Mix of different constructs, misfit CS / C, SP (Rea)
<sup>57</sup> Mullet / Neto (1991a)	International Journal for the Advancement of Counselling	NI	1	Experiment / N = 80 Portuguese + French adolescents	NI			Intention to migrate			W	I	R		Rea	x		Experimental design, HS described	No CS, SP (Rea)
<sup>58</sup> Mullet / Neto (1991b)	International Journal for the Advancement of Counselling	NI	1	Survey / N = 511 Portuguese adolescents	NI			Intention to migrate			D	G	R						Unspecific item ("Do you intend to migrate?"), no CS
<sup>59</sup> Neto / Mullet (1998)	Acta Psychologica	2.385	1	Experiment / N = 40 Portuguese adolescents	NI			Willingness / intention to migrate			W	I	R		Rea	x		Experimental design, HS described	No CS, SP (Rea)
<sup>60</sup> Noe / Barber (1993)	Journal of Organizational Behavior	5.196	4	Survey / N = 326 US professional and technical employees	SD		.69	Willingness to accept mobility opportunities			W	G	R	x			IM	SD (factor analysis)	RE < .70, no CS, mix of geographical + occupational items
<sup>61</sup> Oh (2003)	Population Research and Policy Review	1.354	1	Survey / PHDCN (1995), N = 1123 Chicago residents	NI			Intention to move			E	G	R						No CS
<sup>62</sup> Otto / Dalbert (2012)	International Journal of Human Resource Management	2.061	9	Survey / N = 380 German employees / unemployed / apprentices	SA+M	Dalbert (1999)	.86	Job-related relocation readiness	x	A	W	G	R		Rea		J	RE ≥ .80, CS provided	Misfit CS / C, SP (Rea)
<sup>63</sup> Patrick / Strough (2004)	Journal of Adult Development	0.927	1	Survey / N = 95 employees	NI			Relocation intention			D	G	R						Incomplete sample information (nationality), no CS
<sup>64</sup> Paulauskaite / Seibokaite / Endriuliene (2010)	International Journal of Psychology	1.903	1	Survey / N = 176 Lithuanian college students	SD			Intention to migrate			I	I	R		Loc	x		Measuring intention, SP (Loc)	SD not detailed, no CS
<sup>65</sup> Prehar (2001)	Consulting Psychology Journal: Practice and Research	NI	2	Survey / N = 210 US employees (MBA alumnus)	NI		.91	Relocation intention			E / W	G	R	x		x		RE ≥ .90	No CS, scale measures two constructs
<sup>66</sup> Remhof / Gunkel / Schlägel (2014)	International Journal of Human Resource Management	2.061	4	Survey / N = 518 German business students	SA+M	Vandor (2009)	.79	Intention to work abroad	x	I	E	I	R		Loc		J	CS well justified, additional item (preferred countries)	Scale based on conference paper (Vandor, 2009), RE < .80, misfit CS / C
<sup>67</sup> Remhof / Gunkel / Schlägel (2013)	Zeitschrift für Personalforschung	1.114	4	Survey / N = 518 German business students	SA+M	Vandor (2009)	.74	Intention to work abroad		I	E	I	R		Loc		J	CS provided, additional item (preferred countries)	Scale based on conference paper (Vandor, 2009), RE < .80, misfit CS / C
<sup>68</sup> Sandu / DeJong (1996)	Population Research and Policy Review	1.354	1	Survey, statistics / Social Atlas of Romania (1991), N = 1469 Romanians	NI			Intention to migrate			D	G	R						No CS, unspecific item ("Do you intend to leave this locality?")
<sup>69</sup> Schrujver / Hendriks (1996)	European Journal of Work and Organizational Psychology	3.159	2	Survey / N = 109 British managers	NI			Willingness to accept an IA			W	I	R	x	Loc	x	IA	SP (Loc)	RE not indicated, no CS
<sup>70</sup> Selmer (1998)	International Journal of Human Resource Management	2.061	5	Survey / N = 343 Western business expatriates in Hong Kong	SD		.85	Personal expatriate career intentions			D	I	R				IA	SD (factor analysis), RE ≥ .80	No CS
<sup>71</sup> Sergeant / Ekerdt / Chapin (2010)	Journal of Aging and Health	2.501	1	Panel / Health and Retirement Study (HRS), 2000 + 2002, N = 5020 households	SD			Expectation to move		E	E	G	R					SD (detailed information), fit CS / C	
<sup>72</sup> Sly / Wrigley (1986)	Population and Environment	1.885	2	Survey / Two-round survey conducted in rural Kenya, N = 1051 individuals	NI			Expectation to move			D+E	G	R						RE not indicated, no CS
<sup>73</sup> Stilwell / Liden / Parsons / Deconinck (1998)	Journal of Organizational Behavior	5.196	1	Survey / N = 110 US managers	NI			Likelihood of accepting a transfer	x	E	W	G	R	x	Rea		IM	CS well justified	Misfit CS / C, SP (Rea)

<sup>74</sup> Stinner / Van Loon (1992)	Population and Environment	1.885	2	Survey / Utah Migration Telephone Survey (1988), N = 851 individuals	NI			Migration intention			D	G	R			(x)		RE not indicated, no CS		
<sup>75</sup> Tartakovsky / Schwartz (2001)	International Journal of Psychology	1.903	12	Survey / N = 158 participants in a 2-week camp in Russia	SD			Motivation for emigration			W	G	R		Rea			SD (factor analysis), SP (several reasons)	RE not indicated, no CS	
<sup>76</sup> Tharenou (2003)	Journal of Occupational and Organizational Psychology	3.815	15	Survey / N = 213 Australian employees	SA+SD	Adler (1986)	.92/.90/.92 (3 sub-scales)	Receptivity to international careers			D+W	I	R		(Loc)	x	(J+IA)	SD (factor analysis), RE ≥ .90, SP (Loc)	No CS	
<sup>77</sup> Tharenou (2008)	Organizational Behavior and Human Decision Processes	3.955	5	Survey / N = 839 Australian employees	SA+M	Adler (1986)	.92	Willingness to expatriate	x	M / IN	D+W	I	R			x	(J+IA)	RE ≥ .90, CS provided	No clear conceptualization, misfit CS / C	
<sup>78</sup> Ullrich / Plut / Büttgen (2015)	Journal of Vocational Behavior	3.885	5	Survey / N = 1234 German employees	SA	Landau et al. (1992)	.91	Willingness to relocate			W	G	R	(x)	Rea	(x)	J+IA	RE ≥ .90	No CS	
<sup>79</sup> van der Velde / Bossink / Jansen (2005)	Journal of Vocational Behavior	3.885	1	Survey / N = 300 Dutch dual-career employees	NI			Willingness to accept an IA			E / W	I	R	x			IA		No CS	
<sup>80</sup> Wagner / Westaby (2009)	International Journal of Psychology	1.903	3	Experiment / N = 196 US university students	SD		.97	Willingness to relocate to another country			W	I	R	x		x	x	IA	RE > .90, HS described / experimental design	No CS
<sup>81</sup> Wan / Hui / Tiang (2003)	Personnel Review	1.853	12	Survey / N = 200 Singaporean employees	SA	Aryee et al. (1996)		Willingness to accept an IA		I	W	I	R	x	Rea + Loc		IA	CS provided, SP (Loc)	RE not indicated, misfit CS / C, SP (Rea)	
<sup>82</sup> Wang / Bu (2004)	Career Development International	1.804	7	Survey / N = 145 Canadian senior undergraduate business students	SA+M	Adler (1986)	.77	Receptivity to international careers		I	D	I	R+N				(J+IA)	CS provided	RE < .80, misfit CS / C	
<sup>83</sup> Zhu / Chew (2002)	Career Development International	1.804	5	Survey / N = 357 Singaporean managers	NI		.80	Desire for an IA			W	I	R				IA	RE ≥ .80	No CS	
<sup>84</sup> Zhu / Luthans / Chew / Li (2006)	Journal of Management Development	NI	5	Survey / N = 191 Singaporean managers	NI		.75	Desire for an IA			W	I	R	x			(IA)		RE < .80, no CS	
<b>Frequency</b>				NI: 47 SD: 13 SA+M: 13 SA / (SA): 8 SA+SD: 3				I: 19 E: 3 A: 3 D: 2 D+I: 2 I / W: 2 W: 1 M / IN: 1		W: 38 D: 16 E: 8 E / W: 8 Mix: 10 I: 4 AB: 1 A: 1		I: 40 G: 40 N: 4 R: 74		Rea / (Rea): 21 Loc / (Loc): 12 Rea+Loc: 3		IA: 26 J(J): 15 IM: 3 T: 2 TN: 1				
<b>Sum</b>		<b>Ø 5.12</b>		<b>84</b>				<b>11 32</b>		<b>84 84 84 33 36 15 21 47</b>										

**Table 9: Categorization of the 84 articles according to the 8 criteria (full sample analysis)**

**Note:** Letters in brackets (e.g. '(x)') indicate that only part of the scale (e.g. a single item) measures this characteristic; 12 articles contain only sample items (highlighted light grey), 18 articles give no explicit information on the scale applied, but describe the items indirectly (highlighted middle grey), 1 article provides neither direct nor indirect information on the scale applied - in this case the conceptualization of IRMR was categorized (highlighted dark grey); 'IN' stands for 'interest', 'M' stands for 'motivation'; for the remaining abbreviations see Table 8; 'IA' also includes scales measuring ('IA'), 'LIA+SIA', 'J+IA' and '(J+IA)'; 'T' contains two scales assessing traveling assignments partly (i.e. 'SIA+LIA+T' and '(J+IA+T)').

The different constructs reflect different steps in an individual's decision-making process regarding IRM. Preferences regarding IRM (e.g. *attitudes* and *interests*) influence individuals in their elaboration of different behavioral options (e.g. IRM behavior) in the deliberating or pre-decisional phase (cf. Heckhausen & Gollwitzer, 1987). A *motivational* mindset is predominant in this first phase of decision-making, in which individuals have not yet made a concrete decision regarding IRM behavior. In this phase individuals evaluate their *desire* to relocate abroad, anticipate how they would react in a given IRM opportunity (*willingness*) or assess the probability to relocate abroad in the future (*expectation*). At the end of the deliberating phase individuals decide to implement a concrete international relocation in the near future, i.e. build up a strong goal commitment (*intention*). In the following pre-actional phase individuals then start to plan when, where and how to realize their goal of IRM behavior (Heckhausen & Gollwitzer, 1987). Here, individuals need a strong volition (i.e. persistence) to continue goal-striving in face of obstacles, e.g. long waiting times for immigration papers, and concurrent goals such as starting a family (cf. Heckhausen & Heckhausen, 2010; Kley, 2011). Neither the MGB (Perugini & Bagozzi, 2001) nor existing conceptualizations of IRMR cover this planning phase. However, the success or failure of the planning phase influences whether employees successfully implement (IRM) behavior in the actional phase (Heckhausen & Gollwitzer, 1987). Finally, individuals evaluate the success or failure of IRM behavior in the post-decisional phase. The whole decision-making process regarding IRM is depicted in Figure 6.



**Figure 6: Categorization of the different conceptualizations of IRMR according to the Rubicon model of action phases (Heckhausen & Gollwitzer, 1987; cf. also Heckhausen & Heckhausen, 2010)**

Further, 40 of the 84 scales measure geographical mobility, without specifying the kind of geographical mobility (e.g. international) being measured (e.g. Abraham et al., 2010). 40 scales measure international mobility (e.g. Groeneveld, 2008). The remaining four scales measure some mixed forms of mobility (e.g. domestic and international). The majority of scales ( $n=74$ ) measure relocation mobility, implying a change of an individual's dominant place of residence (e.g. Landau et al., 1992). Ten scales do not contain any information on this criterion (e.g. Andersen & Scheuer, 2004) or measure a type of mobility which excludes relocation (e.g. traveling assignments; Konopaske et al., 2009).

Moreover, 33 (36) scales are categorized as reactive (specific), while 21 scales measure the readiness to relocate abroad for a specific reason (e.g. for a better job; cf. Gould & Penley, 1985) and 12 scales measure IRMR with reference to a specific location (e.g. country; cf. Lowe et al., 1999). 15 scales measure IRMR with situational or hypothetical items (e.g. Kim & Froese, 2012) and 21 scales indicate the length (i.e. time frame) of international mobility (e.g. Kirschenbaum, 1991). 47 of the 84 scales measure a kind of work-related mobility, while most of these ( $n=26$ ) ask participants to specify their readiness to accept an international assignment.

Evaluating the strengths and opportunities of improvement regarding the seven criteria, we summarize that most IRMR scales do not differentiate between international and domestic mobility, although both forms of mobility differ vastly. Additionally, regarding the scales that measure work-related mobility, most IRMR scales assess the readiness to accept

an international assignment offer. However, we found no IRMR scale assessing employees' motivation to initiate the expatriation on their own. Further, most scales either measure IRMR very general or specific (e.g. international relocation for a better job). We found no scale covering the complexity of the IRMR construct, e.g. regarding the different influencing factors of IRMR. However, the scale by Tartakovsky and Schwartz (2001) covers a range of motives for international relocation (e.g. 'interest in another culture', 'desire to raise my standard of living'). Only few scales measure IRMR with reference to specific locations. For instance, Lowe et al. (1999) developed a scale measuring the willingness to accept an international assignment and vary 41 destination countries. Finally, hypothetical or situational items are applied in few cases only. For instance, Kim and Froese (2012) provide a good example of how to apply hypothetical items covering different influencing factors of IRMR: 'You have been asked to go for several years on an expatriate assignment for your company. The host country in consideration is an economically advanced country with a high standard of living and good modern infrastructure. As an advanced economy, the country has a well-structured and high-quality education system. The national language of the country is English. You can communicate with the local people in English.' (p. 3422). They integrated location characteristics (standard of living, language) and thus partly cover the complexity of IRMR.

Moreover, we collected information on the underlying sample and applied methods, the scale development process and reliability indicators (Cronbach's Alpha). Our results indicate that studies from the econometric discipline often use Panel data to estimate models on the different antecedents of IRMR (e.g. Ahn et al., 1999; Boenisch & Schneider, 2010; Epstein & Gang, 2006). These studies often focus on geographical mobility (e.g. 'mobility expectations'; Kan, 1999). Most studies from the business discipline (esp. international HRM) apply surveys asking samples of (managerial) employees to indicate their willingness to accept an international assignment offer from the organization (e.g. Konopaske, Robie, & Ivancevich, 2005; Konopaske & Werner, 2005; Mignonac, 2008). While sociological studies often investigate the 'migration intention' of specific populations (e.g. comparing individuals from Pennsylvania and Taiwan; Liao, 2001; cf. also Becerra, 2012; Gubhaju & De Jong, 2009), experimental or survey designs to investigate IRMR of employees or

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students are often applied within the psychological discipline (e.g. Carr et al., 2010; Dette & Dalbert, 2005; Wagner & Westaby, 2009).

Bello et al. (2009) question the suitability of student samples for research issues that are influenced by contextual factors and real-life experiences. This concerns especially the generalizability of research results, since students normally have no managerial experiences in making strategic decisions in an international context. The work context plays an important role for employees' decision to relocate abroad (Dickmann et al., 2008) and must be distinguished from challenges or motivations associated with student mobility (e.g. Findlay, King, Smith, Geddes, & Skeldon, 2012). Moreover, the different disciplines seem to focus on different psychological constructs. While the business and psychological research disciplines focus on IRM behavior within a working context (i.e. expatriation; cf. Andresen et al., 2014), the econometric and sociological disciplines are interested in migration behavior of large populations and macro-economic influencing factors (e.g. immigration policies; Becerra, 2012).

On average, IRMR is measured with 5.12 items, while in 33 of 84 articles a single item refers to IRMR (e.g. Mullet & Neto, 1991b). According to Gliem and Gliem (2003) it is not reasonable to report Cronbach's Alpha for single-item measures. A test-retest reliability coefficient should be indicated instead. However, our analysis points out that none of the studies report the test-retest reliability for their single-item measure. 33 of the 51 studies that apply multi-item IRMR scales indicate a reliability coefficient (i.e. Cronbach's Alpha). While Cronbach's Alpha is above .80 in 28 studies (e.g. Kim & Froese, 2012; Konopaske et al., 2005; Tharenou, 2008), which can be viewed as a good value (Gliem & Gliem, 2003), 18 studies do not report a reliability coefficient (e.g. Becerra, 2012; Lowe et al., 1999).

Only 13 studies give some information on the development of the scale or report at least factor analytical results, whereas 47 studies provide no evidence regarding the development or even source of the scale applied. A best practice example is offered by Mol et al. (2009). They describe the scale development process in detail. Contrarily, Lowe et al. (1999) neither indicate Cronbach's Alpha for their new developed scale nor give any information on the scale development process. In 24 of 84 studies an existing scale (e.g.

Adler, 1986) is applied (and modified; e.g. by changing items; cf. Dupuis, Haines, & Saba, 2008).

Finally, 13 articles (from the full sample) contain only sample items, 18 articles cite no (sample) items, but describe the items indirectly. One article provides neither direct nor indirect information on the scale applied. In the latter case, we based our categorization on the conceptualization of the construct. Although four of our 84 sources have a very low ISI-impact factor (less than one; cf. Table 9), these articles were still considered since they contain important information on the conceptualization and measurement of the IRMR construct (e.g. Haines et al., 2008). We discuss this aspect within the limitation part of our paper.

### ***3.5.2 Sub sample analysis: international relocation mobility***

Next, we consider only those articles that measure international relocation mobility, i.e. that fulfill the three criteria “kind of mobility: international”, “relocation” and “work-related mobility”. Table 10 gives the results of the subsample analysis (n=26) regarding the remaining five criteria and scale information.

Similar to the results from the full sample, 14 of the 26 studies measure IRMR as a willingness construct. While only few studies assess a desire (n=3) or an expectation (n=2), no study measures IRMR as an intention. 17 scales can be classified as reactive. While different locations or location characteristics are considered in 11 IRMR measurements, there is no single scale covering a range of factors influencing IRMR (four scales measure IRMR with regard to a specific reason). In total, 12 IRMR scales indicate the length of international mobility and seven IRMR scales measure a hypothetical situation. Summing up, it becomes obvious that the results of the full sample analysis (i.e. 84 studies) carry over to the subsample (i.e. 26 studies). Notwithstanding, some differences arise, e.g. concerning the criteria ‘location-specific’ and ‘time-frame’. Most of the 12 (21) scales measuring IRMR location-specific (with reference to a specific time-frame) also measure international work-related mobility. Finally, the reliability coefficient is above .80 for most of the IRMR scales (n=16). However, information on the scale development process is provided by six studies only.

<b>Construct / Criteria</b>	<b>Scale development described (i.e. information on SD process and / or factor analysis)</b>	<b>Reliability <math>\geq</math> .80</b>	<b>4) Reactivity</b>	<b>5a) Specificity (reason)</b>	<b>5b) Specificity (location)</b>	<b>6) Hypothetical situation</b>	<b>7) Time frame</b>	<b>Sum</b>
<i>Desire</i>	(2), 70	(2), (11), 70						<u>3</u>
<i>Intention</i>								<u>0</u>
<i>Expectation</i>					66, 67			<u>2</u>
<i>Willingness</i>	6, 17, 80	6, 23, 36, 41, 44, (45), 46, 80, 83	17, 23, 36, 41, 44, (45), 46, 50, 69, 80, 81, 84	6, 50, 81	6, 17, 23, 36, 41, 50, 69, 81	17, 23, 36, 41, 50, 80	23, 36, 41, 44, (45), 46, 50, 69, 80	<u>14</u>
<i>Mix</i>	(56), 76	14, (56), 76, 77	<u>14</u> , 33, 55, ( <u>56</u> ), 79	(56)	<u>76</u>	( <u>56</u> )	55, 76, 77	<u>7</u>
<i>Others (e.g. Attitude)</i>								<u>0</u>
<b>Sum</b>	<b>7</b>	<b>16</b>	<b>17</b>	<b>4</b>	<b>11</b>	<b>7</b>	<b>12</b>	<b><u>26</u></b>

**Table 10: Results of the subsample analysis (N = 26 studies measuring international relocation mobility)<sup>5</sup>**

<sup>5</sup> Note: Numbers in brackets stand for studies that partly measure international relocation (e.g. a subscale measures traveling assignments); numbers written in italics indicate IRMR scales that partly measure work-related mobility (e.g. only few items measure work-related mobility); underlined numbers reflect studies that only partly measure the criterion.



### 3.6 Discussion

Individuals who consider international relocation are confronted with numerous complex decisions and planning issues (Remhof et al., 2014). A valid conceptualization and measurement of IRMR should reflect this complexity. Based on the results of our literature analysis and the Rubicon model of action phases (Heckhausen & Gollwitzer, 1987) we draw conclusions for future conceptualizations and measurements of IRMR.

Our results show that most studies remain imprecise with respect to the meaning of IRMR or apply different constructs interchangeably. Only few studies provide an explicit conceptualization of IRMR and most of these refer to the TPB (Ajzen, 1991) to categorize IRMR as an intention. This kind of conceptualization would imply that individuals who have not yet made the concrete decision to relocate abroad within the near future (i.e. who have a low intention), also have a low IRMR. However, these individuals could have a strong motivation or desire to relocate abroad at some point of their career (cf. Perugini & Bagozzi, 2001, 2004). Focusing on single phases of individuals' decision to relocate abroad (e.g. intention) can lead to misinterpretations regarding employees' IRMR. Since employees can be in different phases of the decision process, future conceptualizations of IRMR should cover all phases of the decision-making process that lead to the implementation of IRM behavior (cf. Heckhausen & Gollwitzer, 1987). Some IRMR studies conceptualize IRMR as an attitude or interest (e.g. Tharenou, 2008). These constructs reflect important antecedents of IRMR, yet must be distinguished from the construct itself.

The results of our literature analysis indicate that most IRMR scales measure willingness. Past research on willingness has rather focused on predicting risky and spontaneous behavior (e.g. risky drinking and driving) of adolescents (e.g. Gerrard et al., 2006). Willingness was often assessed by hypothetical or situational items, that can provide contextual information (e.g. concerning location characteristics; cf. Kim & Froese, 2012). However, the suitability of the willingness construct for predicting goal-oriented behavior such as IRM is questionable and must be proved in future empirical studies.

Regarding the measurement of IRMR, our results show that many of the IRMR scales have a high degree of specificity, particularly addressing the reason for international mobility. Drawing on recent research which has identified several motives for international mobility (e.g. Dickmann et al., 2008; Doherty, Dickmann, & Mills, 2011), it is questionable whether specificity regarding a particular reason for international mobility (e.g. for a better job) is reasonable. Instead, a valid and reliable IRMR measure should assess a range of individual motives in favor of (e.g. career advancement) but also barriers against (e.g. relocation of the family) international relocation (cf. Tartakovsky & Schwartz, 2001).

Employees' decision to relocate abroad cannot be viewed separately from its context (e.g. private or work environment). Several influencing factors have not been considered by existing IRMR scales, yet play an important role for the decision to relocate abroad (e.g. social factors such as partner's support; cf. van der Velde, Jansen, Bal, & van Erp, 2017). This also concerns location-specific influences on IRMR which have only seldom been assessed by existing IRMR measurements. However, locations and their characteristics (e.g. personal safety) play an important role for employees' IRMR (e.g. De Eccher & Duarte, 2016; Kim & Froese, 2012;) and international mobility decisions (e.g. Dickmann, 2012). For instance, Wagner and Westaby (2009) found that safety aspects of the destination country strongly influence individuals' IRMR. A specific location and its image (e.g. London as a global center for business) can also be a motive for international relocation (cf. Dickmann, 2012). However, future (qualitative) studies are necessary to reveal in which phases of the decision-making process the different influencing factors become relevant. Subsequently, new IRMR measurements can be developed that cover the different phases and influencing factors of employees' decision to relocate abroad.

Today, many forms of international work-related mobility exist. They largely differ regarding its challenges for the individual (cf. Tharenou, 2015). IRMR studies should focus on a specific form of international work-related mobility and justify their choice. However, most IRMR studies remain imprecise regarding the kind of international work-related mobility they focus on, hampering the comparability and interpretation of IRMR research results. Most scales measure the readiness to accept an international assignment offer by an organization, ignoring the existence of non-reactive forms of IRM (i.e. self-initiated expatriation, cf. Andresen et al., 2014). Moreover, several IRMR scales concretely define

the length of international mobility (e.g. 1-4 years; cf. Konopaske et al., 2009). These scales only cover cases of foreign work in which the individual relocates abroad for a specific period of time which is set by the organization. However, IRM might also cover cases in which the individual has not yet planned to return to the home country or intends to settle permanently in a new country. Additionally, global managers, whose career paths usually include three or more long-term international assignments, have not been considered by existing IRMR scales, too (cf. Tharenou, 2015). Future conceptualizations and measurements of IRMR should clearly state which kind of international work-related mobility they focus on.

Finally, existing IRMR studies apply heterogeneous sampling strategies. While business research mainly refers to (managerial) employee samples (e.g. Konopaske & Werner, 2005), psychological studies often investigate students' IRMR (e.g. Wagner & Westaby, 2009) and sociological studies focus on individuals' or households' IRMR (e.g. Drinkwater & Ingram, 2009). The suitability of student samples for research issues such as IRMR, which are strongly influenced by contextual factors, is questionable (cf. Bello et al., 2009). A clear definition and conceptualization of the IRMR construct helps future research to focus on the same construct, distinguish it from related constructs (e.g. migration intention), and adjust their sampling strategy and measurement of IRMR accordingly.

### **3.6.1 *Limitations***

Some limitations may restrict the validity of our results. First, not all studies provide the scale applied to measure IRMR. In these cases, our categorization follows sample items, indirect descriptions of items or the conceptualization of the construct. Altogether, this may lead to misclassifications of journal articles. However, there is only one article that does not provide any direct or indirect information on the scale applied. Second, in our search for literature we used rather broad keywords such as migration and relocation. This might have increased the number of articles that measure geographical mobility. As the term 'migration' covers both domestic and international forms of mobility, it has been categorized as measuring geographical mobility. The sociological literature on migration has often been neglected by past economic research (Andresen et al., 2014). Since this strand of the

literature can also provide important information on the IRMR construct, we decided to include the term migration in our literature review. Moreover, our results of the full sample compare to those when only studies on international work-related mobility are considered. Finally, further limitations may arise due to journals that have a low 5-year ISI impact factor. However, such ranking factors are also criticized for being prone to artificial influences of third variables (Moed, 2002; Moed & Van Leeuwen, 1995). We therefore explicitly used the long-term (i.e. 5-year) ISI impact factor which is usually found as more reliable than the short-term factor (Rousseau, 2002).

### ***3.6.2 Implications for future research***

Several individual, social, organizational, job- and career-related as well as location-specific factors influence individuals in their decision to relocate abroad (cf. Dickmann et al., 2008). Future IRMR research and especially scale development studies should consider this complexity to draw a realistic picture of the IRMR construct. However, to date no validated research instrument exists that covers the different influencing factors (cf. Hippler, 2009). While past research already shed some light on the importance individuals attribute to the different influencing factors (e.g. Dickmann et al., 2008; Doherty et al., 2011), it is still unclear in which phase of the decision-making process the different motives and barriers become evident. Future IRMR research could close this research gap, e.g. by conducting narrative interviews with participants telling about their (past) decisions to relocate abroad (cf. Hippler, 2009).

Location-specific influences play an important role for an individual's decision to relocate abroad (e.g. Dickmann, 2012). However, the mechanisms behind an individual's evaluation of different locations and their characteristics are still opaque (De Eccher & Duarte, 2016). Future research should try to reveal in which IRMR phase individuals build up preferences regarding different locations (e.g. countries) and consider different location characteristics (e.g. standard of living).

### **3.6.3 Implications for practice**

Based on our literature analysis companies can select IRMR scales that have a high reliability and fulfill the criteria that companies aim to measure (e.g. IRMR dependent upon different destination countries). In this way, companies could standardize and thus improve their expatriate selection processes (cf. Brookfield GMAC, 2016).

Moreover, conceptualizing and measuring IRMR as a dynamic multidimensional construct allows companies to identify whether the employee is at the beginning (i.e. desire) or end (i.e. planning) phase of the decision-making process concerning IRM. Since each phase requires different tasks and challenges from the individual (e.g. showing persistence in face of obstacles in the planning phase; cf. Heckhausen & Heckhausen, 2010), companies could adjust their management actions accordingly (e.g. by providing specific kind of organizational support). As not all employees have already developed an IRMR intention, companies should rather assess the individual's desire (i.e. motivation) to relocate abroad and its influencing factors (e.g. motives) when selecting candidates for the expatriate pool. By early assessing the motives and barriers of employees concerning IRM (cf. Dickmann et al., 2008), companies can prevent problems (e.g. partner who is not willing to relocate) that might lead to the rejection of international relocation at a later stage of the decision-making process (e.g. in the planning phase). To give an example, most organizations are interested in specific countries only (e.g. China; cf. Dupuis et al., 2008). This may lead to a conflict between the employee's desired countries and his opportunities. Location concerns are among the most common reasons for rejecting international moves (e.g. Adler, 1986; cf. De Eccher & Duarte, 2016). Hence, assessing location-specific preferences in an early stage of the decision-making process may prevent that employees later reject their international relocation plans.

An IRMR scale which considers the complexity of the IRMR construct (i.e. regarding different motives and barriers) is also highly relevant for companies (cf. Hippler, 2009). For example, attractive career perspectives may increase the IRMR of an employee who appreciates promotion, but would not increase the IRMR of an individual who values family life over work. In the latter case, companies should focus on family-related measures, such as organizational support for the trailing spouse (cf. McNulty, 2012). Family concerns are

one of the main reasons why employees reject international assignment offers (Brookfield GMAC, 2016). By measuring the employees' IRMR within its context (i.e. by considering influencing factors), companies can align their support with the needs of the individual employee, whose motivation to relocate abroad increases and may possibly influence the performance abroad.

Finally, based on the analysis of the employee's motives and barriers, companies can provide cross-cultural trainings (Caligiuri & Tarique, 2012). This kind of training might be particularly valuable to increase the IRMR of employees who indicate (e.g. in an IRMR survey) to fear intercultural problems abroad. The results of an IRMR survey can, for instance, reveal that the employees' uncertainty is grounded in the lack of ability to speak the host country's language. In this case, companies should offer language trainings or possibilities to interact with employees speaking the host country's language (cf. Caligiuri & Tarique, 2012).

### **3.7 Conclusions**

Our results reveal that, to date, the literature lacks consistency between the conceptualization and the measurement of IRMR. Only few studies provide a conceptualization of the IRMR construct. Based on the results of our literature analysis and the Rubicon model of action phases, we recommend future IRMR research to consider the entire decision-making process regarding IRM when conceptualizing and measuring IRMR. Focusing on single phases only (e.g. intention) can lead to misinterpretations regarding employees' IRMR. Future research is necessary to reveal in which phases of the IRM decision-making process the different influencing factors (e.g. location characteristics) become relevant. HRM practice can apply the results of our literature analysis to identify those IRMR scales that are both valid and reliable. In this vein, HRM practice may improve in the selection and development of expatriate candidates. Finally, based on the assessment of influencing factors (i.e. barriers and motives of international relocation), companies can align their measures (e.g. kind of support) with the needs of the individual employee.

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## 4 International relocation mobility readiness and its antecedents

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The following chapter comprises the version of the manuscript accepted by the journal.

### 4.1 Abstract

*Purpose:* International relocation for work reasons implies uncertainty and stress, resulting in high expatriate failure rates. Hence, organizations should consider employee's international relocation mobility readiness (IRMR) in selection processes. The aim of the present study was to identify personal as well as social antecedents of IRMR.

*Design/methodology/approach:* Data were gathered by an online survey (N= 273 German employees) and analyzed using SEM.

*Findings:* SEM results indicate that attitudinal (boundaryless mindset), biographical (previous international work experience) and social variables (the perceived social endorsement of international relocation mobility) are positively related to IRMR. The positive relationship between personality variables (uncertainty tolerance, proactive personality) and IRMR is mediated by boundaryless mindset.

*Research limitations/implications:* The sampling method applied limits the generalization of our results.

*Practical implications:* Results can be applied in personnel selection to find employees with a strong IRMR. Thus, expatriate failure rates could be reduced.

*Originality/value:* This is the first study that addressed personal as well as social antecedents of IRMR.

**Keywords:** Internationalization, mobility, mobility readiness, international relocation, boundaryless mindset

## 4.2 Introduction

### 4.2.1 *Relevance of international relocation mobility readiness (IRMR)*

In many contemporary organizations international relocation mobility is an important part of employees' corporate career, especially in management (Joseph, Fong Boh, Ang, & Slaughter, 2012). With a view to placing the right person in the right position and to develop employees, organizations invest two to three times the assignee's annual salary on each traditional expatriate assignment (Bidwell, 2011). Work role transitions such as international transfers usually invoke uncertainty in the individual (e.g. adjusting to a new culture, language problems), often associated with high degrees of stress (Anderzén & Arnetz, 1999) that have been identified as major causes of expatriate failure (Lee, 2007). According to a recent survey including 123 companies worldwide, 22 percent of the expatriates leave their organization during the course of their assignment (GMAC, 2012). For the organization some indirect costs of expatriate problems include loss of company reputation, failed negotiations, and decreasing performance (Borstorff, Harris, Feild, & Giles, 1997). Direct costs of expatriation failure are valued at 2 to 2.5 Billion US-Dollar per company per year (Kotabe & Helsen, 2001).

Prerequisites for performance abroad are not only abilities such as cross-cultural competencies that ease adjustment to a foreign culture (Selmer, 2001) and opportunities, but also a motivation to relocate (cf. Appelbaum, Bailey, Berg, & Kalleberg, 2000). Consequently, companies have a legitimate interest in identifying factors that indicate an employee's willingness to relocate internationally for work reasons, more specifically the readiness to master uncertain situations and obstacles usually associated with international relocation (Wagner & Westaby, 2009). Research findings about IRMR and its antecedents would then contribute to more accurate personnel selection decisions with the objective of reducing the number of employees who reject relocations in view of anticipated dissatisfaction while abroad and, at best, to enhance employee adjustment and performance while overseas (Boies & Rothstein, 2002).

#### **4.2.2 *Past research on IRMR***

From a research perspective, to date there are only a few studies that canvass the antecedents of IRMR. Most of these studies measured different forms of relocation mobility readiness in the same scale (e.g. domestic and international; Mignonac, 2008; Otto & Dalbert, 2012) or captured the readiness to relocate abroad for a specific reason (e.g. for better living conditions; e.g. Drinkwater & Ingram, 2009; Mol, Born, Willemsen, van der Molen, & Derous, 2009). Several studies measured the specific case of willingness to accept an international assignment offer from the organization (e.g. Konopaske, Robie, & Ivancevich, 2009), omitting the fact that international relocation for work reasons also subsumes further forms of work-related international mobility, such as self-initiated expatriation, describing individuals that apply for a job abroad on their own initiative (Andresen Bergdolt, & Margenfeld, 2013). In addition, the focus of recent research was mainly on (international) relocation mobility behavior and its determinants (e.g. Dickmann, 2012). Taken as a whole, the personal and social factors influencing employee's IRMR still remain underexplored (Otto & Dalbert, 2010).

#### **4.2.3 *Aim and structure of the current study***

The current study intends to fill these crucial research gaps, focusing especially on personal factors (attitudinal, biographical and personality variables) as well as social determinants (social norms) of IRMR. The remainder of this article is organized as follows: First, IRMR is defined and demarcated from related constructs. A model of IRMR and its antecedents is then developed, building upon the theory of planned behavior (Ajzen, 1985). The sample, measures and statistical procedures of our empirical study are then outlined. Lastly, the findings are presented and discussed indicating implications for management as well as suggestions for further research taking limitations of our study into consideration.

### **4.3 Definition and demarcation of IRMR**

IRMR is defined as the willingness to cross international borders involving a change of one's dominant place of residence for work reasons. Long-term forms of work-related international mobility including a change of one's dominant place of residence are supposed to have more severe consequences for the individual and his or her private environment (e.g. relocation of the entire family, embedding in a new social community) than short-term forms of international mobility (cf. Konopaske & Werner, 2005). Hence, employees deciding to relocate abroad should have a comparably stronger will to be internationally mobile. Consequently, international business travelers (Welch, Welch, & Worm, 2007) and flexpatriates (Mayerhofer, Hartmann, Michelitsch-Riedl, & Kollinger, 2004) who do not relocate their main place of residence to the destination country are not in the focus of the IRMR construct but assigned and self-initiated expatriation. The umbrella term for IRMR is geographic mobility readiness, which subsumes further forms of geographical mobility such as domestic and on-the-job mobility readiness (e.g. truck drivers). Geographic mobility readiness must be distinguished from occupational mobility readiness, i.e. the readiness to change one's occupation (Otto, 2004).

### **4.4 Antecedents of IRMR**

IRMR and its antecedents can be conceptualized using the theory of planned behavior (Ajzen, 1985; see Figure 7) that has often been applied in past mobility-related research and has received high empirical support (e.g. Boies & Rothstein, 2002; Konopaske et al., 2009).

The probability that a certain behavior of interest is realized depends largely on the intention to show this behavior (Ajzen, 1985, 1991). The intention to perform a certain behavior can be further defined as "indications of how hard people are willing to try, of how much of an effort they are planning to exert, in order to perform the behavior" (Ajzen, 1991, p. 181). The intention to show a certain action is determined by three forces: attitude towards the behavior, subjective norms and perceived behavioral control (Ajzen, 1985). The attitude towards the behavior can be defined as the degree to which a person has a favorable or unfavorable evaluation of the behavior in question and of the possible consequences of this

behavior (e.g. career progress). The perceived behavioral control is the self-evaluated ability to perform a certain behavior which depends on available resources and opportunities. The social norms describe the expectations of the social environment towards a particular behavior (Ajzen, 1991).

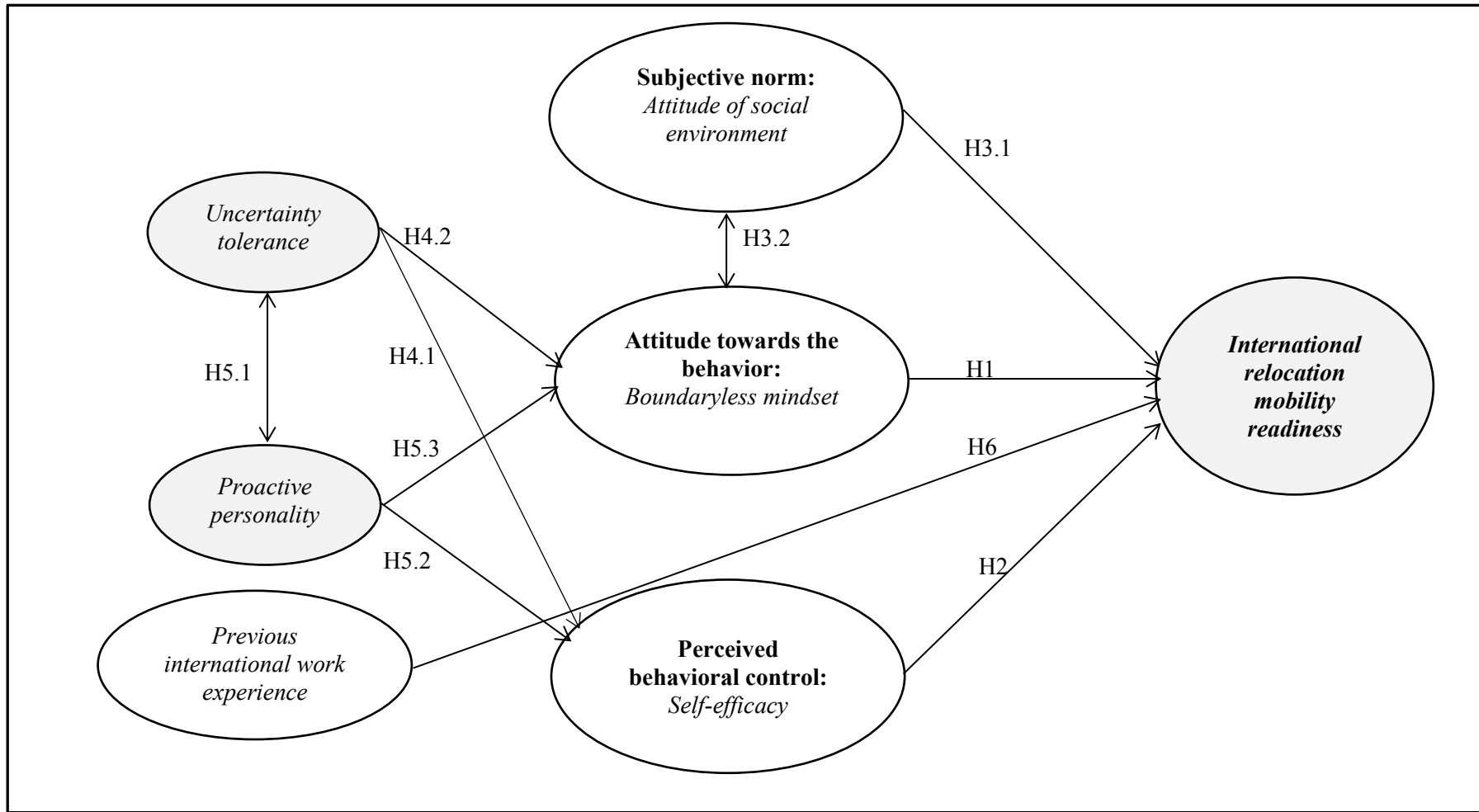


Figure 7: A model of international relocation mobility readiness and its antecedents applying the theory of planned behavior (Ajzen, 1985)

Conceptualizations of relocation mobility readiness in literature are related to the ‘intention’ component in the theory of planned behavior. However, the conceptualizations differ in terms of their relatedness to making a concrete decision. Many authors conceptualize (I)RMR as the general intention to relocate prior to a concrete commitment, i.e. “as an individual’s intention to perform a specific type of behavior [...], not the actual decision of whether to move” (Eby & Russel, 2000, p. 44; see also Mol et al., 2009). In contrast to this definition, others describe (I)RMR as more reactive to an organizational action, i.e. as the intention to accept a relocation mobility offer from an organization (e.g. Dupuis, Haines, & Saba, 2008; Konopaske et al., 2009), or as linked to a specific reason for a move, e.g. relocating abroad for a better job (e.g. Drinkwater & Ingram, 2009; Wagner & Westaby, 2009). Compared to Eby and Russel’s definition, this second definition of IRMR is more concrete in that it is related to making a decision in a specific situation and includes concrete planning prior to a specific action. And yet other authors operationalize the construct as a diffuse feeling about future (international) moves (‘I probably will move internationally’; cf. Brett & Stroh, 1995), i.e. as a general disposition prior to making a decision and building an intention. In sum, these three definitions describe three different steps in the decision-making process (see also Heckhausen & Gollwitzer, 1987). In this paper we refer to Eby and Russel’s (2000) definition. Thus, IRMR being less reactive and more general than for instance the operationalization described by Konopaske and colleagues (2005), we exclude that a concrete relocation offer from the side of the organization must have taken place and assume that IRMR is not related to a specific relocation motive.

An important determinant of the intention building according to Ajzen (1991) is the attitude towards the behavior. An important attitude in the field of careers is the boundaryless career attitude (Arthur & Rousseau, 1996) that comprises two dimensions: physical mobility, i.e. the transition across organizational, occupational, role or geographical boundaries during one’s career, and psychological mobility or boundaryless mindset, i.e. perceptions held by career actors as to alternative career options (Forret, Sullivan, & Mainiero, 2010). Previous studies, such as research about international assignments (Stahl, Miller, & Tung, 2002), have mainly focused on physical mobility across international and organizational boundaries (Sullivan & Arthur, 2006) neglecting psychological aspects although, following the boundaryless career concept, boundaryless mindset should also be relevant in international



relocations and might increase an individual's IRMR. According to Briscoe et al. (2006) boundaryless-minded individuals enjoy tasks or assignments that require them to work outside of the boundaries of their current organization. International relocation for work reasons usually implies the change of one's current organization (e.g. to work in a new organization such as a foreign subsidiary). Hence, we deduce the following hypothesis.

*Hypothesis 1: Boundaryless mindset is positively related to IRMR.*

The second determinant of IRMR according to the theory of planned behavior is the perceived behavioral control, i.e. the subjective ability to perform a certain behavior which depends on available resources and opportunities (Ajzen, 1991). For instance, a person who is working in a company offering numerous opportunities for expatriate assignments might tend to be convinced to be able to successfully relocate abroad and, hence, perceives high behavioral control. Self-efficacy is a domain-specific variable, which varies depending on an individual's experience (Ajzen, 1991) such as prior international work experiences. Mol and colleagues (2009) revealed that the willingness to expatriate is positively and significantly related to an employee's core self-evaluations, including self-efficacy. Tharenou (2003) showed that the proposed relationship solely exists, when people moved to developing but not developed countries. However, Tharenou (2003) measured personal agency, which also subsumes other social cognitive components. This leads to:

*Hypothesis 2: Self-efficacy is positively related to IRMR.*

The third predictor of the intention to perform a certain behavior and for its execution is social norms. These norms describe the expectations of relevant people in the social environment towards international relocation, and refer to the perceived social pressure to perform or refrain from an international relocation. Only a few studies focused on the influence of the social environment on relocation mobility readiness. In this vein, it has been shown that the perceived *attitude* of the closest social network (family, friends, and colleagues) towards a person's mobility has a strong influence on a person's willingness to perform a mobile job (Otto & Dalbert, 2010) as well as on job-related relocation mobility readiness (Otto & Dalbert, 2012). Most studies, however, focused on the marital or family *status* and draw a diffuse picture as they found either no (Baldrige, Eddleston, & Veiga, 2006), a negative (Tharenou, 2003) or only a weak influence of marital status on geographic

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mobility readiness (Noe, Steffy, & Barber, 1988). Valcour and Tolbert (2003) argue that the attitudes of an individual's closest social environment (e.g. family) influences an individual's boundaryless mindset, while especially women's career decisions are determined by their family situation. Thus, we hypothesize:

*Hypothesis 3.1:* The perceived positive attitude of relevant people in the social environment (family, friends, and acquaintances) towards an individual's international relocation is positively related to IRMR.

*Hypothesis 3.2:* The perceived positive attitude of relevant people in the social environment (family, friends, and acquaintances) towards an individual's international relocation is positively related to boundaryless mindset.

According to social learning theory of career choice (Krumboltz, 2009) a person's educational and occupational preferences are inter alia determined by personality variables. We expect uncertainty tolerance and proactive personality to be important variables in connection with international relocation (e.g. Mol et al., 2009; Tharenou, 2010). Uncertain situations such as international relocations can be described as complex, ambiguous and hard to manage due to their unpredictability (Budner, 1962). However, individuals differ concerning their ability to cope with uncertainty (Dalbert, 2003). While people with a weak uncertainty tolerance tend to see uncertainty as a threat and try to avoid uncertain situations, people with a strong uncertainty tolerance tend to consider uncertain situations as challenging and to actively quest for them (Ladouceur, Gosselin, & Dugas, 2000). Dette and Dalbert (2005) showed that a strong uncertainty tolerance among students entering the job market had a positive impact on students' relocation mobility readiness. Hence, we expect uncertainty tolerance to be positively related to a person's self-efficacy and indirectly with IRMR. Accordingly, Mol et al. (2009) found a small, but significant and positive relationship between expatriation willingness and uncertainty tolerance. McArdle, Waters, Briscoe and Hall (2007) suggest that adaptable individuals, i.e. individuals with a strong boundaryless mindset, have a high tolerance for uncertainty and ambiguity. As a consequence, the following hypotheses are inferred:

*Hypothesis 4.1:* Uncertainty tolerance is positively related to self-efficacy.

*Hypothesis 4.2:* Uncertainty tolerance is positively related to boundaryless mindset.

Proactive behavior is defined as “taking the initiative in improving current circumstances or creating new ones” (Crant, 2000, p. 436) and as being motivated to change and improve a situation or oneself rather than simply reacting or adjusting passively. Past studies revealed a positive relationship between proactive personality and self-efficacy (Seibert, Kraimer, & Crant, 2001). According to Tharenou (2010) women with a strong proactive personality more often self-initiate their expatriation to advance their career or to overcome the unfairness of not being sent abroad by their employer. Hence, we expect a high proactive personality to increase a person’s self-efficacy and to indirectly increase an individual’s IRMR. McArdle et al (2007) assume that highly adaptable individuals, who are characterized by a strong proactive personality, have a higher tolerance for uncertainty. Banai and Harry (2004) suggest that individuals who have “boundaryless global careers [...] unilaterally take charge over their careers” (p. 98). Boundaryless career agents are described as self-determined and proactive concerning the management of their careers (Inkson, Gunz, Ganesh, & Roper, 2012).

*Hypothesis 5.1:* Proactive personality is positively related to uncertainty tolerance.

*Hypothesis 5.2:* Proactive personality is positively related to self-efficacy.

*Hypothesis 5.3:* Proactive personality is positively related to boundaryless mindset.

Perugini and Bagozzi (2001) criticize that past behavior is not incorporated in the theory of planned behavior and argue that the frequency of past behavior is positively related to the intention, especially in uncertain and unstable environments, as individuals become more positive about actions they have mastered in the past (see also meta-analytical substantiation by Ouellette & Wood, 1998). Referring to human capital theory, Van der Velde, Bossink, and Jansen (2005) argue that individuals who have already invested in their international career by previous international moves have an increased commitment towards their international career and, thus, are more ready to relocate abroad again in the future. Accordingly, the authors found a significant positive relationship between male expatriates’ previous international work experience and their readiness to accept a future international assignment. This leads to:

*Hypothesis 6:* Previous international work experience is positively related to IRMR.

To sum up, IRMR can be defined as an individual's general intention to change his or her dominant place of residence for work reasons, crossing international borders. It is directly preceded by attitudes towards an international relocation (high boundaryless mindset), perceived behavioral control (high self-efficacy), social norms (perceived positive attitude of the social environment towards international relocation) and previous international work experience, and indirectly by personality variables (high uncertainty tolerance, high proactive personality).

## **4.5 Methods**

### ***4.5.1 Sample characteristics***

Two hundred and seventy-three employees (155 male, 118 female) participated, of which 261 were German nationals. All data were gathered by an online survey distributed via private and work-related personal contacts and social networks of the authors and of a group of 12 multipliers, who provided the researchers with contact data of potential participants and allowed to reach a widespread target population from all parts of Germany. Participants were on average 34 years old (SD=11.09). The majority of the participants (n=200) were married or in a relationship; 186 were childless. Participants had worked 7.7 years for their current employer, on average (SD=9.1), 159 held non-management positions and the remaining respondents held management-level positions with 20 respondents having a job at executive level. Nearly half of the sample (n=129) had a university or college degree. Regarding past work-related international experiences, 120 respondents worked abroad at least once (M=1.44; SD=3.89). Of these internationally-mobile respondents 35 were assigned abroad by their employer, while 45 were self-initiated expatriates. The remaining respondents moved abroad in a different way (e.g. internship) (n=23), commuted between their home and work place (n=9), or did not indicate their mode of international work experience (n=8).

#### 4.5.2 *Instruments and measures*

*Boundaryless mindset.* A subscale of the German version of the boundaryless career attitude scale was used (Briscoe, Hall, & DeMuth, 2006; Gasteiger, 2007) containing eight items measured on a five-point Likert scale (1=totally disagree, 5=totally agree;  $\alpha=.88$ ). A sample item reads “I would enjoy working on projects with people from across many organizations”.

*Self-efficacy.* Self-efficacy was assessed using the shortened version of the occupational self-efficacy scale (Schyns & von Collani, 2002) consisting of eight items measured on a six-point Likert scale (e.g. “I can remain calm when facing difficulties in my job because I can rely on my abilities.”,  $\alpha=.89$ ).

*Perceived attitude of the social environment.* In order to reflect the social norms concerning international relocation mobility we assessed the perceived attitude of the social environment towards relocation mobility by using five items (e.g. “My environment – family, friends, acquaintances – thinks it’s good if I would work abroad for a certain period of time.”) by Otto (2004), which were answered on a six-point Likert scale (1=strongly disagree, 6=strongly agree;  $\alpha=.88$ ).

*Proactive personality.* The proactive personality scale (Bateman & Crant, 1993) used consists of twelve items measured on a six-point Likert scale (1=strongly disagree, 6=strongly agree;  $\alpha=.88$ ). A sample item reads “I excel at identifying opportunities.”

*Uncertainty tolerance.* To measure uncertainty tolerance eight items developed by Dalbert (2003) were used (a six-point Likert scale ranging from 1=strongly disagree to 6=strongly agree;  $\alpha=.78$ ). A sample item reads “I like change and excitement”.

*International relocation mobility readiness.* IRMR was assessed relying on the German general mobility readiness scale by Dalbert (1999), which was further modified and validated by Otto (2004). We intentionally chose this scale as it measures IRMR as a general construct, not related to a specific reason for relocating or containing a reactive component. The four item subscale is answered on a six-point Likert scale (“I can picture myself to work abroad for a certain period of time.”; “I do not consider working abroad for an uncertain

period of time.”; “I know several places worldwide, where I would like to live and work.”; “I am positive about working abroad.”;  $\alpha=.87$ ).

*Previous international work experiences.* Participants were asked to list the countries, time-frames and kinds of previous international work experiences (e.g. expatriate assignments, self-initiated expatriation). The total amount of previous international work experiences was summed up for each participant.

*Control variables.* Gender (1=female; 2=male), family status (1=single; 2=in a relationship, not married; 3=married), and total number of children were considered as control variables, since past research indicates some impact on IRMR (Tharenou, 2003).

#### 4.6 Results

Table 11 presents descriptive statistics and correlations among the variables. The correlations indicate that being female, being married and having children is significantly and negatively related to IRMR ( $r = -.14, p < .05$ ;  $r = -.17, p < .01$ ;  $r = -.20, p < .01$ ).

To test the hypotheses, a structural equation model was evaluated using maximum likelihood estimate in Amos 20 (see Figure 8). We tested the mediating role of boundaryless mindset, self-efficacy and the attitude of a person’s social environment towards international mobility. In order to test whether a fully or a partially mediation model was best, we compared the fully mediated model (theory-based and according to our hypotheses) with the partially mediated model (with direct paths from personality variables to IRMR). As shown in Table 12, the reasonably moderate goodness of fit indices suggested that the fit of both models was acceptable (cf. Hox, 1995). The comparison of both models indicates that the CFI is identical (.91); the partially mediated model fits negligibly better than the fully mediated model ( $\Delta\chi^2=2.88$ ) but is theoretically less plausible. When integrating gender, family status and the total amount of children in our model, the fit decreased considerably (CFI=.89;  $\Delta\chi^2=229.8$ ). In total, 54 percent of the variance in IRMR was estimated in the fully mediated model.

Regarding path coefficients, boundaryless mindset and perceived attitude of a person's social environment were both positively and significantly related to IRMR ( $\beta=.21$ ,  $p<.01$ ;  $\beta=.63$ ,  $p<.001$ ). Hence, Hypotheses 1 and 3.1 were supported. However, against Hypothesis 2 we found no significant relation between self-efficacy and IRMR. Regarding the mediated paths, proactive personality as well as uncertainty tolerance both were positively and significantly related to boundaryless mindset ( $\beta=.35$ ,  $p<.001$ ;  $\beta=.17$ ,  $p<.05$ ), supporting Hypotheses 4.2 and 5.3. Further, we found a positive and significant relationship between proactive personality and self-efficacy ( $\beta=.75$ ,  $p<.001$ ), providing empirical support for Hypothesis 5.2. Against Hypothesis 4.1, uncertainty tolerance was not related to self-efficacy. In line with Hypothesis 5.1, we found a positive and significant relationship between uncertainty tolerance and proactive personality ( $\beta=.27$ ,  $p<.001$ ). Regarding the direct paths, we found no significant relationship between uncertainty tolerance, proactive personality and IRMR. Hence, the influence of both variables on IRMR seems to be mainly mediated via boundaryless mindset. Previous international work experience was positively and significantly related to IRMR ( $\beta=.12$ ,  $p<.05$ ), supporting Hypothesis 6.

A multi-group analysis with AMOS (cf. Kline, 2004) applied to the subgroups of assigned and self-initiated expatriates shows that the relationship between the boundaryless mindset and IRMR was slightly higher for assigned than for self-initiated expatriates ( $\beta_{SIE}=.15$ , n.s.;  $\beta_{AE}=.11$ , n.s.) and the attitudes of the social environment were more important for assigned than for self-initiated expatriates ( $\beta_{SIE}=.60$ ,  $p<.01$ ;  $\beta_{AE}=.74$ ,  $p<.001$ ) However, the multi-group analysis did not indicate significant path differences between the two groups ( $z=-.387$ ;  $z=-.757$ ).

	<i>M</i>	<i>SD</i>	<i>1</i>	<i>2</i>	<i>3</i>	<i>4</i>	<i>5</i>	<i>6</i>	<i>7</i>	<i>8</i>	<i>9</i>	<i>10</i>
1. gender	-	-	-	-.08	-.08	.02	.02	-.12*	-.17**	.00	-.14*	-.11
2. family status	-	-			.52**	.13*	.04	-.11	-.15*	-.08	-.17**	.03
3. children	.54	.91				.09	-.06	-.14*	-.19**	-.13*	-.20**	-.00
4. self-efficacy	4.5	.73					.65**	.18**	.13*	.27**	.11	.11
5. proactive personality	4.2	.73						.32**	.17**	.45**	.17**	.11
6. uncertainty tolerance	3.3	.94							.26**	.36**	.31**	.15*
7. social environment	2.9	.98								.43**	.59**	.09
8. boundaryles mindset	3.6	.75									.45**	.16**
9. IRMR	4.1	1.45										.19**
10. previous int. work exp.	2.2	9.24										

**Table 11: Inter-correlations, means, and standard deviations**

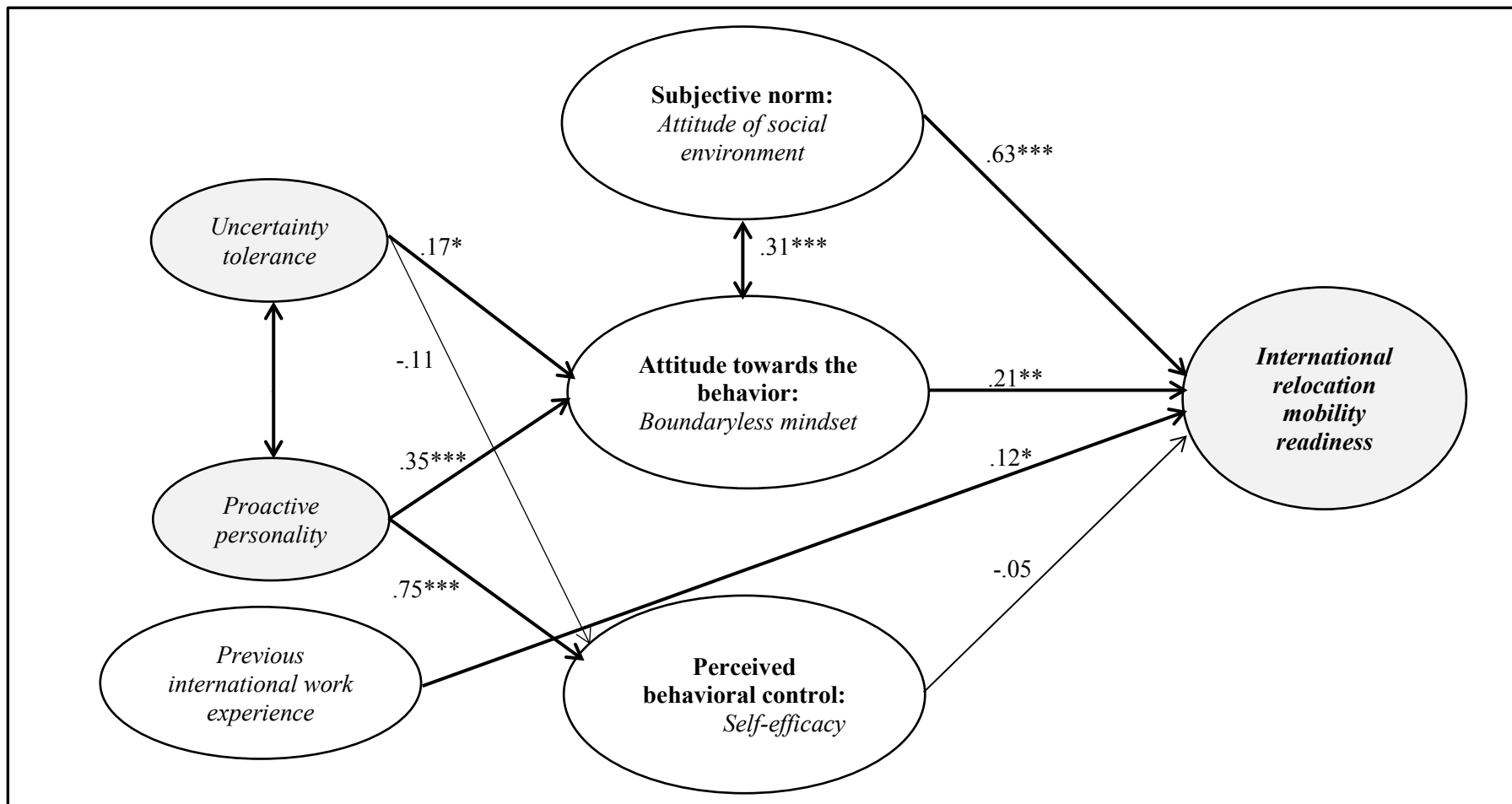
**Notes:** N = 273; M, mean; SD, standard deviation; Pearson's correlation coefficients, two-tailed; \*p < .05, \*\*p < .01



	$\chi^2$	<i>df</i>	<i>CMIN/DF</i>	<i>TLI</i>	<i>CFI</i>	<i>RMSEA</i>
Model 1 (fully mediated model)	1405.54	841	1.67	.90	.91	.050
Model 2 (partially mediated model)	1402.66	839	1.67	.90	.91	.050
Model 3 (fully mediated model incl. control variables)	1635.34	961	1.70	.88	.89	.050

**Table 12: Results of mediated model comparisons**

**Notes:** N=273; CFI values  $\geq .95$  indicate a very good fit (Bentler and Bonett, 1980). RMSEA values should be no greater than .05 to indicate that the model is appropriate (Browne and Cudeck, 1993); Indicator error terms were allowed to covary to account for parallel items in the indicators proactive personality, self-efficacy, attitude of social environment and uncertainty tolerance (cf. Byrne, 2010); three items with factor loadings lower than .40 were eliminated from the indicator variable uncertainty tolerance (Alpha increased from .76 to .78).



**Figure 8: Results of the Structural Equation Modeling (AMOS)**

**Notes:** Model 1 (fully mediated model); N = 273; \*p < .05, \*\*p < .01, \*\*\*p < .001; standardized Beta-coefficients

#### 4.7 Discussion

The present study gives key insights into decision factors influencing an individual's IRMR. The theory of planned behavior by Ajzen (1985) provided a valuable theoretical framework for our data and offers a valid approach to operationalize IRMR in future research. IRMR was conceptualized as the general or nonreactive intention to cross international borders involving a change of one's dominant place of residence for work reasons. Past studies mainly considered demographic factors as possible determinants of relocation mobility readiness and neglected personal as well as social antecedents (Otto & Dalbert, 2010). Thus, our results make a major contribution to current, esp. international mobility research, by revealing both social (i.e. social endorsement of international relocation mobility) as well as personal (i.e. boundaryless mindset, personality, previous mobility experience) predictors of IRMR.

Regarding personal antecedents, our results contribute to a further differentiation of the psychological component of the boundaryless career concept. Whereas Briscoe et al. (2006) claim that the boundaryless mindset does not necessarily imply international mobility behavior, this study gives support to its importance for IRMR. Furthermore, uncertainty tolerance and proactive personality were important personality variables in the context of an individual's boundaryless mindset and, thus, have an indirect impact on IRMR. To our best knowledge, it is the first proof of the relationship between uncertainty tolerance and boundaryless mindset and only Briscoe et al. (2006) and McArdle et al. (2007) empirically proved the positive correlation with proactive personality. An individual who proactively initiates change at work might also be tolerant for uncertainty and feel more capable of handling transitions across international and organizational boundaries (McArdle et al., 2007). Moreover, knowledge about the processes through which IRMR develops (e. g. mediating processes) is practically and theoretically important, yet has seldom been the focus of past research (Remhof, Gunkel, & Schlägel, 2013). Our results reveal the mediating role of boundaryless mindset, shedding some light on this black box.

Another notable result is that - in accordance with the theory of planned behavior - the perceived attitude of the social network towards the person's international relocation

mobility plays a key role in determining people's IRMR. Past studies support this result for on-the-job (Otto & Dalbert, 2010) and job-related relocation mobility readiness (Otto & Dalbert, 2012). Particularly the partner's attitudes towards relocation showed to have a crucial impact (Brett & Stroh, 1995; Mignonac, 2008). Correlates such as the marital status or number of children were insufficient proxies.

However, the third factor in Ajzen's model (1985), the perceived behavioral control or self-efficacy, had no effect on IRMR. One reason for this might be that we measured an individual's general self-efficacy. Future research should develop and add a measure of domain-specific self-efficacy, i.e. in relation to international relocation.

#### ***4.7.1 Implications for future research***

With respect to personal antecedents of IRMR, future studies should in addition consider more broad personality concepts such as the Big Five or include different personality variables (e.g. sensation seeking; Roth, 2003) and add motives. Regarding respondents' social network we recommend specifying the key actors in future studies in order to determine their relative influence, e.g. the partner's versus friends' attitude toward an individual's international relocation mobility behavior. In addition to social and personal factors, future research should consider structural factors that might influence the decision to relocate internationally for work reasons, such as the respective country's culture (e.g. cultural distance), economic situation (e.g. developmental state, cf. Tharenou, 2003; Wagner & Westaby, 2009), political state (e.g. terrorism), or company-related factors (e.g. the instrumentality of international mobility for a promotion; cf. VIE-Theorie, Vroom, 1964).

Moreover, future research should conceptualize IRMR according to the steps in the decision-making process (cf. Heckhausen & Gollwitzer, 1987), prove empirically whether IRMR can be categorized as behavioral intention, and provide a validated and reliable scale to measure IRMR. Past research rather focused on the general effect of motives on international mobility behavior (e.g. Hippler, 2009). Yet, certain influencing factors such as the attractiveness of a specific location (Dickmann, 2012) or related to safety in the destination country (Wagner & Westaby, 2009) might only become evident in specific

phases of the decision-making process. We are considering all these research gaps within the scope of a larger research project.

#### **4.7.2 *Implications for practice***

The IRMR scale allows companies to find employees valuing international relocation mobility and, thus, to invest their personnel development budget more specifically in a pool of selected employees, who are really willing to master the stress and uncertainty associated with international relocation (e.g. trainings to strengthen their uncertainty tolerance). Furthermore, knowledge about employees' IRMR allows organizations to assign them to positions that afford different levels of international mobility (Morgeson et al., 2007). In this vein, companies might reduce their expatriate failure rate and costs or even expatriate turnover rates (GMAC, 2012).

The employee's closest network was very important for individuals to take the hurdles associated with international relocation. In line with this, the 2012 Global Relocation Trends Survey report indicates that the spouse or partner plays a crucial role for successful expatriation. As only one fifth of the married assignees go abroad without their partner, companies should assure that employees receive support especially from relatives inter alia by improving their well-being e.g. by assuring that the accompanying partner finds a suitable job abroad (GMAC, 2012).

#### **4.7.3 *Limitations***

The present study has some limitations. First, the sampling method limits the generalization of our results as the sample composition is largely determined by the choice of the multipliers. However, the multipliers were informed to search solely for participants that execute legal work and have preferably past international working experiences. Moreover, this technique has the potential advantage that widespread networks or regions can be reached and that it usually results in large sample sizes (Atkinson & Flint, 2001). Another limitation results from the sample composition, since participants were mainly German nationals. The culture of origin might influence a person's IRMR. In line with this,

Mignonac (2002) found that French managers are less willing to relocate geographically. Consequently, cross-country generalizations from the present results should be made with care. Additionally, the majority of participants were male. Recent research indicates that women are considered less often for international assignments than men, which might influence women's IRMR negatively (cf. Tharenou, 2010). However, integrating gender as a control variable, the fit of our model decreased considerably. Secondly, all data were obtained by self-report, which could result in heightened path coefficients due to common-method bias (CMB) (e.g. Podsakoff, MacKenzie, Lee, & Podsakoff, 2003). However, IRMR being a subjective construct, probands can best assess their willingness themselves, and was mainly measured via self-report in past studies (e.g. Konopaske et al., 2009; Mol et al., 2009). To test for CMB, we conducted Harman's one-factor test by including the study variables in an unrotated factor analysis (Podsakoff et al., 2003). The results broke into several factors, providing some evidence against CMB problems in our data.

Moreover, the scales to assess the IRMR and the perceived attitude of the social environment towards an individual's international relocation mobility are rather new and hence, not sufficiently validated so far (cf. Otto, 2004). However, Cronbach's alpha of both scales - as proofed in this study - can be judged as good. Finally, international relocation mobility behavior was assessed via past work-related international experiences, which might be biased due to memory effects. Further studies could measure international relocation mobility behavior from another source, for instance, extracted from biographical data.

#### **4.8 Conclusions**

Grounded on the theory of planned behavior we conceptualized IRMR as an individual's general intention to change his or her dominant place of residence for work reasons, crossing international borders. Results revealed that it is positively related with attitudes towards the behavior (high boundaryless mindset), previous international work experience as well as social norms (perceived positive attitude of the social environment towards international relocation mobility). Further, our results indicate that the relationship between proactive personality, uncertainty tolerance and IRMR might be mediated by boundaryless mindset.

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## **5 Employees' international relocation mobility readiness and its antecedents: A theoretical framework**

The following chapter comprises the latest version of the working paper: Weisheit, J., & Andresen, M.: Employees' international relocation mobility readiness and its antecedents: A theoretical framework.

### **5.1 Abstract**

Past research indicates that employees' motivation to relocate abroad plays a crucial role for the success or failure of expatriate assignments. Hence, companies should know about employees' international relocation mobility readiness (IRMR) and its antecedents. However, past research has defined and conceptualized IRMR heterogeneously, leading to mixed results regarding its antecedents. Moreover, we lack a theoretical framework that comprehensively describes employees' decision-making process regarding their international relocation mobility. This study seeks to close these crucial research gaps. Based on interviews with 24 employees and by applying a grounded theory approach we develop a decision theory of international relocation mobility. The theory distinguishes between a basic and situational IRMR. Employees' basic IRMR influences their situational appraisal of international relocation mobility (i.e. perceived fit, perceived manageability), resulting in their situational IRMR and behavior. Individual (e.g. adaptivity) and situational (e.g. location characteristics) variables influence this decision. We outline implications for expatriate management and research.

**Keywords:** International relocation mobility readiness, willingness to relocate abroad, expatriation willingness, motives, grounded theory

## 5.2 Introduction

In a globalized world, individuals' international mobility has become a necessary precondition to reach the next career level or obtain specific leadership positions in many companies (De Cieri & Dowling, 2012; Haines, Saba, & Choquette, 2008). According to Pinto, Cabral-Cardoso and Werther (2012), the risk to suffer from career detriment might push employees to accept international assignments, even if their motivation to relocate abroad is low. Sending originally unwilling employees abroad can cause cultural adjustment problems, decrease job satisfaction and increase the intention to terminate the assignment (cf. Pinto et al., 2012). For organizations, expatriate failure is associated with high direct and indirect costs (Yeaton & Hall, 2008). Research has identified poor expatriate selection processes as one of the main reasons for high rates of expatriate failure (Stone, 1991; Yeaton & Hall, 2008). Hence, the assessment and selection of expatriation candidates is one of the three areas companies want to improve in (CARTUS, 2014). Many U.K. and U.S. companies still select expatriation candidates primarily based on their technical skills (Tungli & Peiperl, 2009). However, prerequisites for expatriate performance are not only abilities (e.g. technical or intercultural) and opportunities, but also the motivation to relocate abroad (Appelbaum, Bailey, Berg, & Kalleberg, 2000).

Existing definitions and conceptualizations of employees' international relocation mobility readiness (IRMR) differ vastly across and within scientific disciplines (e.g. Becerra, 2012; Kim & Froese, 2012). While the management literature describes the construct as '*willingness* to accept an international assignment offer' (e.g. Mignonac, 2008), the sociological research discipline focuses on '*migration intention*' (e.g. Hughes & McCormick, 1985; Sandu & DeJong, 1996). Both psychological constructs have different implications for the meaning of IRMR and hence must be distinguished: In contrast to individuals who '*intend*' to relocate abroad, individuals who are '*willing*' to relocate abroad have not yet planned nor considered a concrete international relocation (Remhof, Gunkel, & Schlaegel, 2014). Willingness reflects individuals' anticipation of how they would react if confronted with the opportunity to perform a specific behavior (e.g. an international assignment offer) (Pomery, Gibbons, Reis-Bergan, & Gerrard, 2009). While intentions have been proven to be good predictors of different kinds of goal-oriented behavior (Ajzen, 1991; cf. Armitage & Conner, 2001), willingness has been investigated within the context of

spontaneous or risky behavior only (e.g. risky drinking and driving) (e.g. Gerrard, Gibbons, Houlihan, Stock, & Pomery, 2008).

By now a strand of literature from different scientific disciplines has been interested in the question why individuals are motivated to relocate abroad for a longer and continuous period of time (e.g. Drinkwater & Ingram, 2009; Konopaske, Robie, & Ivancevich, 2009; van der Velde, Jansen, Bal, & van Erp, 2017). These studies usually follow the positivist school of research and empirically test hypotheses about the influence of individual objective factors (e.g. marital status and number of children) on IRMR (Landau, Shamir, & Arthur, 1992; Mignonac, 2008), often investigating U.S. managers or professionals (e.g. Konopaske et al., 2009). Overall, the results deviate from each other and explain only small to moderate amounts of variance in the IRMR construct (between 20 and 50 percent; cf. Landau et al., 1992; Mol, Born, Willemsen, van der Molen, & Derous, 2009).

To conclude, contemplating a relatively mature body of research on IRMR, we still see unanswered questions regarding the definition and conceptualization of the IRMR construct. In consequence, it is still unclear, whether past research has revealed all relevant influencing factors of IRMR and how these antecedents can be integrated and weighted within a comprehensive framework. Hence, we diverge from there and use qualitative data to explore why people decide to relocate internationally in view to suggest compelling new theory that inspires and supports future discussions in this area. We apply the principles of grounded theory (Glaser & Strauss, 1967; Strauss & Corbin, 1990; cf. Murphy, Klotz, & Kreiner, 2017) by following the constructivist approach by Charmaz (2006).

The results of this paper are valuable for research and practice in international human resource management. First, past research has focused on expatriates' abilities (e.g. cross-cultural competencies; Selmer, 2001) and opportunities (e.g. expatriate selection; Anderson, 2005). This article focuses on employees' motivation to relocate abroad as a major prerequisite for expatriate performance abroad (e.g. Chen et al., 2010; cf. Appelbaum et al., 2000). Second, we provide a clear definition and conceptualization of the IRMR construct. Thus, we improve the interpretation and comparability of future IRMR research results. Third, we contribute by generating a comprehensive theoretical framework about employees' decision-making process regarding IRM, integrating and interrelating the



different antecedents of IRMR. Our results are of particular relevance for companies as to improve and systematize their expatriation selection and development processes (CARTUS, 2014; Caligiuri & Tarique, 2012; Mol et al., 2009). Moreover, based on our IRMR theory, companies can identify employees' motives and barriers and adjust the conditions for international mobility (e.g. kind of organizational support; McNulty, 2012) as well as developmental actions (e.g. training of expatriates; Romero, 2002) accordingly.

Our article is structured as follows. We frame our introduction and the following conceptual overviews by applying the theoretical concepts that actually emerged from our grounded IRMR theory (Glaser & Strauss, 1967; Straus & Corbin, 1990). Following the logic of the grounded theory approach, the theory would normally appear after the data analysis. However, we use the more traditional presentational strategy as to improve the comprehensibility of our article (cf. Suddaby, 2006). Hence, a critical literature review about IRMR and its antecedents will be provided first. The research strategy and sample are then outlined, followed by the presentation of our major findings and theoretical framework. Finally, this paper will close with a discussion of major findings, indicating implications for management as well as suggestions for further research.

### **5.3 Critical literature review: IRMR and its antecedents**

Several different definitions and conceptualizations of the IRMR construct exist (e.g. Mol et al., 2009; Tharenou, 2008). Froese et al. (2013) define expatriation willingness as "the likelihood of an employee accepting a job offer, which requires living and working in a foreign country" (p. 3248), while Otto and Dalbert (2012) define IRMR in more general terms as "a person's attitude toward relocation mobility and hence toward possible future moves" (p. 169). Tharenou (2008) describes IRMR as "the degree to which an individual is motivated to expatriate for a job for a year or more" (p. 184), while stating that IRMR might also reflect an employee's interest in an international career. Drawing on psychological literature, 'interests' can be defined as individual patterns of likes and dislikes (Mount, Barrick, Scullen, & Rounds, 2005), while a 'motivation' describes the direction, intensity and persistence of goal-directed behavior (Heckhausen & Heckhausen, 2010). 'Attitudes', again, are evaluative statements - either favorable or unfavorable - concerning objects,

people, or events (Eagly & Chaiken, 1993). The ‘likelihood of acceptance’, again, is based on revealed preferences only. Hence, we need to clearly distinguish all four constructs.

These constructs reflect different steps in an employee’s decision-making process regarding their international relocation mobility (IRM). First, employees develop specific preferences regarding IRM (attitudes and interests). Then, they elaborate IRM as a behavioral option (likelihood of acceptance). Finally, the decision to relocate abroad in the future is the development of a strong goal commitment (motivation) (cf. Ajzen, 1991; Perugini & Bagozzi, 2004). Moreover, the definitions indicated above remain imprecise concerning the meaning of central terms applied, e.g. ‘living and working’ or ‘relocation mobility’. We still do not know enough about the characteristics of the IRMR construct, e.g. regarding its stability over time (cf. Tharenou, 2003). All in all, a clear definition and conceptualization of the IRMR construct does not exist. It may be a motivation, an attitude or another kind of psychological construct. Consequently, we derive the following research question:

*RQ1: How can the IRMR construct be defined and conceptualized psychologically?*

Several studies investigate the influence of individual, social, organizational, job- and career-related as well as location-specific factors on IRMR (e.g. Mol et al., 2009; Konopaske et al., 2009; cf. De Eccher & Duarte, 2016). However, the results of these studies are often hard to compare as they define and conceptualize IRMR heterogeneously (cf. Remhof et al., 2014) or focus on overlapping yet different constructs (e.g. ‘job mobility’; cf. Ng, Sorensen, Eby, & Feldman, 2007).

Regarding individual factors, most of the studies focus on the influence of socio-demographic factors (e.g. age, sex and education) on IRMR and generate deviating results. Landau et al. (1992) find that women are less willing to relocate for career advancement or company needs than men, especially if they judge their spouse’s career as being equal or more important than their own. Van der Velde, Bossink and Jansen (2005) show that men are more willing to accept an international assignment than women, whereas Otto and Dalbert (2012) find no significant gender effects. Moreover, studies indicate that younger individuals usually are more motivated to move abroad rather than older individuals (e.g.

Brett, Stroh and Reilly, 1993; Eby & Russell, 2000; Noe & Barber, 1993). While having a family (i.e. partner, children) is often negatively related to IRMR (e.g. Dupuis, Haines, & Saba, 2008; Konopaske et al., 2009), de Eccher and Duarte (2016) find no significant relationship. Personality traits have seldom been in the focus of past IRMR research (e.g. Andresen & Margenfeld, 2015; Otto & Dalbert, 2010), although they often explain more variance in IRMR than demographics (cf. Otto & Dalbert, 2012). Some studies indicate that individuals with a high uncertainty tolerance as well as a high openness for new experiences also show a high IRMR (e.g. Mol et al., 2009; Otto & Dalbert, 2012).

Another important strand of research explores the importance of a given set of motives underlying *past* decisions to move abroad (e.g. Dickmann, Doherty, Mills, & Brewster, 2008; Doherty, Dickmann, & Mills, 2011; Stahl, Miller, & Tung, 2002). This retrospective view (i.e. indicating reasons for past behavior) might be prone to memory biases. Additionally, it is questionable whether the list of motives is complete. Notwithstanding, this literature reveals valuable insights concerning the reasons why employees move abroad.

Concerning social factors, recent studies show that the attitude of an employee's social environment (e.g. partner and children) towards foreign work plays a crucial role for IRMR (e.g. Andresen & Margenfeld, 2015; Otto & Dalbert, 2012). Especially the partners' willingness to move as well as dual career issues influence employees' decisions to accept an international assignment offer (e.g. Dickmann et al., 2008; Mäkelä, Käsälä, & Suutari, 2011; van der Velde et al., 2017). A growing number of studies focuses on the influence of location factors (e.g. cultural distance) on employees' IRMR (e.g. Doherty et al., 2011; Kim & Froese, 2012; Lowe, Downes, & Kroeck, 1999; Tharenou, 2003; Wagner & Westaby, 2009). For instance, de Eccher and Duarte (2016) show empirically that language skills are related to a better evaluation of specific location factors (e.g. safety and cultural attraction). Moreover, the perceived level of safety is shown to strongly influence individuals' IRMR (de Eccher & Duarte, 2016; cf. also Wagner & Westaby, 2009). Likewise, Dickmann (2012) finds that location-specific factors, such as London's reputation as global center of business, influences employees' international mobility decisions.

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Research results vary concerning the influence of job- and career-related factors on IRMR. While some studies show that individuals with high organizational commitment are less likely to be internationally mobile (e.g. van der Velde et al., 2005), others reveal the complete opposite (e.g. Mignonac, 2008). However, studies focusing on motives for *past* international work-related mobility reveal that employees primarily went abroad because of job, career and developmental factors (e.g. Dickmann, 2012; Dickmann et al., 2008; Stahl et al., 2002). Especially, the kind of job offered abroad, chances for skill development and career advancement upon return are strong motivating factors (Dickmann et al., 2008). Organizational factors such as financial incentives also show to be a main driver of employees' *past* decisions to relocate abroad (cf. Dickmann et al., 2008). However, most of these studies were conducted in the U.S. context (e.g. Yurkiewicz & Rosen, 1995), while results by Stahl et al. (2002) indicate that German participants rate the importance of financial incentives as minor.

Existing theoretical frameworks about IRMR focus on selected antecedents of IRMR only (e.g. Froese et al., 2013; Konopaske, Robie, & Invancevich, 2005). They seldom explain the mechanisms how these factors influence employees' IRMR (e.g. van der Velde et al., 2017). While the theory of planned behavior (Ajzen, 1991) is often applied to the IRMR context (e.g. Boies & Rothstein, 2002; Konopaske et al., 2009), its suitability must be questioned. The theory of planned behavior lacks individual variables such as personality traits (Andresen & Margenfeld, 2015), which are important antecedents of IRMR (e.g. Otto & Dalbert, 2012). Ng et al. (2007) suggest a theory about the influence of specific individual, decisional and structural factors on 'job mobility', which generally subsumes intra- and inter-organizational moves. Job mobility can be associated with international relocation (e.g. inter- and intra-self-initiated expatriates; cf. Andresen, Bergdolt, Margenfeld, & Dickmann, 2014), but need not necessarily imply international mobility. Job embeddedness is another construct that should be distinguished from IRMR (Mitchell, Holtom, Lee, Sablinski, & Erez, 2001). The reasons why people stay in an organization, community or location (i.e. link, fit and sacrifice) can partly explain why employees refuse to relocate internationally (Mignonac, 2008; Reiche, Kraimer, & Harzing, 2011). However, the reasons for relocating are not always symmetrical to the reasons for staying. Pull factors such as attractive locations (Dickmann, 2012) or personal traits such as adventurousness (Konopaske et al., 2009)

motivate individuals to relocate abroad. Consequently, although IRMR and job embeddedness share some variance regarding their influencing factors, a clear distinction is necessary.

Summing up, past research reveals several different antecedents of IRMR. To the best of our knowledge, these factors or motives have never been integrated, weighted and related within a comprehensive theoretical framework. We still do not know concrete cause-effect relations, i.e. which influencing factors are relevant in particular phases of an employee's decision-making process regarding IRM. This would allow companies to influence employees' IRMR by specific measures applied at the right time. Moreover, a wide array of factors influences employees' IRM decision in a complex and interrelated way. For instance, children might not be perceived as barrier of IRM if the partner provides high social support. These multi-causal effects must be understood and considered within a theoretical framework about IRMR. Additionally, it is not clear whether all factors influencing employee's IRMR have already been identified (e.g. specific personality traits). Thus, we deduce the following research question:

*RQ2: Which factors influence IRMR in particular phases of an individual's decision-making process regarding IRM (cause-effect relations) and how do these factors interrelate and affect IRMR (multi-causal effect relations)?*

## **5.4 Methods**

### **5.4.1 Research Strategy**

We aim to develop a comprehensive theoretical framework about the factors influencing employees' IRMR as well as their interrelationships and effects on IRMR. In line with grounded theory (Glaser & Strauss, 1967), we set up a non-random sample (cf. Charmaz, 2006). More specifically, we applied *theoretical sampling*. "The rationale behind theoretical sampling is to direct data gathering efforts towards collecting information that will best support the development of the theoretical framework." (Shah & Corley, 2006, p. 1827). Hence, we sequentially searched for persons that served to refine or extend our

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previous analysis results, e.g. by comparing responses of employees with no past IRM experience with those who have a high experience ('polar types'; cf. Shah & Corley, 2006).

Past IRMR research relied on heterogeneous sampling strategies. While management researchers mainly referred to (managerial) employee samples (e.g. Konopaske & Werner, 2005), psychological studies often investigated students' IRMR (e.g. Wagner & Westaby, 2009). Bello et al. (2009) question the suitability of student samples for proximate research issues that are "sensitive to the influence of context and life experiences" (p. 362). This concerns especially the extent to which research results can be generalized, because students usually have not enough real-life managerial experience to judge important strategical decisions in an international context (cf. Bello et al., 2009). The organizational context plays an important role for employees' decision to relocate abroad (cf. Dickmann et al., 2008) and must be distinguished from challenges or motivations associated with student mobility (e.g. Findlay et al., 2012). Consequently, we consider only individuals who were dependently employed or self-employed at the time of the interview.

Many forms of international work-related mobility exist, such as international business travels or long-term assignments, linked to different challenges for the individual (cf. Tharenou, 2015). The consequences associated with long-term international mobility (e.g. relocation of the whole family) usually differ from those of short-term or frequent forms of international mobility (cf. Konopaske & Werner, 2005). Hence, both kinds of international mobility should not be mixed up in a definition of IRMR. We concentrate on those kinds that require an international relocation, i.e. a change of an individual's dominant place of residence when moving abroad (cf. Andresen et al., 2014). Moreover, we only consider forms of IRM behavior that require a long-term or permanent residential in the host country. For instance, we include assigned expatriates sent abroad by their employer, as well as self-initiated expatriates, who initiate their relocation abroad on their own while changing employers (e.g. Andresen, Biemann, & Pattie, 2015). We also consider global managers whose career paths usually include three or more long-term international assignments (cf. Tharenou, 2015). However, our understanding of IRMR excludes forms that do not involve a relocation such as international business travels (Welch, Welch, & Worm, 2007), or that require international relocation on a frequent and temporary basis (e.g. rotational assignees; cf. Collings, Scullion, & Morley, 2007).

Landau et al. (1992) showed that characteristics of the current and permanent place of residence influence an individual's IRMR. Thus, to minimize potential biases, we focused on respondents who were permanently residing in Germany at the time of the interview. Moreover, past research reveals occupational influences on IRM behavior (e.g. Bozionelos, 2009; Ramboarison-Lalao et al., 2012). As our goal is to develop a theory that applies across a variety of occupational contexts (cf. Shah & Corley, 2006), we consider employees with a broad range of different occupations (cf. Table 13), which allows us to compare and discuss job-specific influences on IRMR. Participants were found via private and work-related personal contacts and social networks of the authors and of a group of 14 multipliers who provided the researchers with contact data of potential participants. We finished the sampling process when there was only marginal additional information from further interviews (i.e. our categories were saturated) and we did not uncover any information that required a refinement of our theoretical framework (i.e. *theoretical saturation*; cf. Shah & Corley, 2006).

#### **5.4.2 Sample Characteristics**

15 out of the 24 interviewees were male and all were permanent German residents at the time of the interview (cf. Table 13). The average age of participants was 38.4 years (SD=12.0). Almost all participants were either married (n=11) or in a relationship (n=11). Most participants had no children (n=15), while two participants were expectant parents. The participants covered a broad range of different professional activities (e.g. engineer, confectioner and physician) with an average professional experience of 13.7 years (SD =11.1). 19 participants held at least a bachelor's degree. The majority (n=14) had at least one past IRM experience with an average duration of 2.5 years (SD=1.5). Four of the ten interviewees without past IRM experience had concrete plans to relocate abroad in the near future.

No.	Sex	Age	Current and permanent place of residence	Professional activity	Years of prof. experience	Highest professional qualification	Family status	Past IRM experience	Future planned IRM	Amount (age) of children	Duration & medium of the interview
1	male	27 y.	Germany	field application engineer	0,5 y.	Master of Science (engineering)	single	none	yes	0	70 min
2	male	50 y.	Germany	self-employment (manager of an ice-cream parlor)	not indicated	Ph.D. (chemistry)	married	Hawaii (5 years, SIE) & Hawaii (since 3 years, SIE)	no	3 (27, 23 & 20 y.)	40 min (Skype)
3	male	34 y.	Germany	electrical engineer	3 y.	Diploma (engineering)	married	none	yes	his wife is pregnant	45 min (Skype)
4	female	48 y.	Germany	anaesthetist and rescue medicine specialist	20 y.	state examination (medicine)	married	none	no	1 (23 y.)	42 min (Skype)
5	male	26 y.	Germany	employee (international sales)	3 y.	Bachelor of Arts (business administration)	single / in a relationship	Spain (7 months, AE) & Spain (2 years, AE)	no	0	55 min
6	male	53 y.	Germany	managerial employee (industry insurance)	33 y.	Diploma (business administration)	married	Spain (3 years, AE)	no	2 (25 & 22 y.)	48 min
7	male	41 y.	Germany	self-employment (manager of an advertising agency, hemp market)	not indicated	“Abitur” / high school graduation	married	Fuerteventura (since 5 months, SIE)	no	0	22 min
8	female	27 y.	Germany	confectioner and cook	11 y.	master's certificate	single / in a relationship	Austria (1 year, SIE)	no	pregnant	34 min
9	female	26 y.	Germany	consultant for local economic development and development aid	3,5 y.	Master of Science (social sciences, German-French)	single / in a relationship	Morocco (since 2.5 years, SIE)	no	0	45 min (Skype)
10	female	27 y.	Germany	educator	5 y.	vocational training qualification (education, insurance broker)	single / in a relationship	none	yes	0	32 min
11	male	27 y.	Germany	employee (automotive industry)	not indicated	Bachelor of Arts (business administration)	single / in a relationship	none	no	0	33 min
12	male	53 y.	Germany	business consultant	23 y.	Diploma (business administration)	married	South Africa (2 years, AE)	no	3 (28, 23 & 4 y.)	35 min
13	male	65 y.	Germany	pharmacist	23 y.	state examination (pharmacy)	single / in a relationship	none	no	0	33 min
14	female	50 y.	Germany	school bus driver	not indicated	vocational training qualification (nurse)	married	Singapore (3 years, trailing spouse), Canada (since 3 years, SIE)	no	1 (24 y.)	40 min (Skype)
15	male	30 y.	Germany	project specialist (automotive industry)	5 y.	Diploma (engineering)	single / in a relationship	England (6 months, AE)	no	0	44 min



16	female	27 y.	Germany	personnel officer / recruiter (automotive industry)	3,5 y.	Diploma (business administration)	single / in a relationship	none	no	0	31 min
17	female	49 y.	Germany	secretary (university)	20 y.	Diploma (biology)	single / in a relationship	Ireland (1.5 years, SIE), the Netherlands (3 years, trailing spouse), Germany (since 3 years, trailing spouse)	no	0	29 min
18	male	26 y.	Germany	research assistant, Ph.D.	1 y.	Master of Science (business administration)	single	New York (6 months, SIE)	no	0	31 min
19	female	29 y.	Germany	employee (practice for clinical diagnostics)	7 y.	Master of Science (social education)	married	none	no	0	32 min
20	male	30 y.	Germany	manufacturing coordinator (automotive supplier among others)	7 y.	Diploma (engineering)	married	none	no	0	20 min
21	male	33 y.	Germany	project manager (technological development)	not indicated	Master of Science (automotive production), Diploma (mechanical engineering)	single / in a relationship	none	yes	0	56 min
22	male	53 y.	Germany	soldier (for 32 years), today working for the customs	35 y.	vocational training education	married	Oklahoma (4 years, AE), Naples (4 years, AE), Texas (11 months, AE)	no	2 (16 & 17 y.)	53 min
23	female	45 y.	Germany	educator (youth work)	4 y.	state examination (teaching post)	married	Oklahoma (4 years, trailing spouse), Naples (4 years, trailing spouse)	no	2 (16 & 17 y.)	61 min
24	male	46 y.	Germany	freelance IT-consultant	19 y.	Diploma (engineering)	single / in a relationship	Ireland (4 years, SIE), Ireland (6 months, SIE), Netherlands (5 years, SIE)	no	0	39 min (phone)
Ø	-	38.4 y.	-	-	13.7 y.	-	-	-	-	-	40.4 min

**Table 13: Sample characteristics (Notes: SIEs are self-initiated expatriates and AEs are assigned expatriates)**

### 5.4.3 *Data collection*

The data collection began by narrative or unstructured interviews. The degree of structuring increased during the interview process. Based on the input we received by our interviewees, we constantly developed our interview questions and adapted the interview guide accordingly. We started out with a general and open question about participants' past IRM experiences to encourage participants to tell about the aspects of IRMR they find important. We only inquired if something was unclear or especially interesting (cf. Charmaz, 2006). If participants had no past IRM experiences, we asked for their personal reasons. All interviews were conducted in participants' native language (German) (cf. Table 13).<sup>6</sup> All interviews were tape-recorded and transcribed. Thus, the selected statements in the following were translated from German. The average duration of an interview was 40.4 minutes (SD = 12.2).

### 5.4.4 *Analysis: Grounded Theory*

Our analysis follows the grounded theory approach by Charmaz (2006), which is based on the pioneering work by Glaser and Strauss (1967). In general, grounded theory consists of "systematic, yet flexible guidelines for collecting and analyzing qualitative data to construct theories 'grounded' in the data themselves." (Charmaz, 2006, p. 2). In addition to its inductive nature, grounded theory can be mainly characterized by its iterative approach to data analysis. This means that data is collected and analyzed simultaneously (Charmaz, 2006). During this process, researchers and participants jointly construct "reality" based on social interactions and past experiences (Charmaz, 2008). Following Strauss and Corbin (1990), a critical literature review about the antecedents of IRMR was included. It allows to compare and contrast past findings with the core elements of our theory (cf. also Shah & Corley, 2006).

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<sup>6</sup> 18 interviews were conducted face-to-face, five via Skype and one via phone. The first 14 interviews were conducted consecutively in a team of 14 researchers. To stimulate the exchange of ideas, we discussed insights gained from previous interviews as well as the selection of further interviewees in regular meetings. The following 10 interviews were conducted by the first author of this article, who constantly analyzed and interpreted the insights gained from all 24 interviews.

We used MAXQDA 12 for the coding process. Analyzing participants' narratives and self-perception regarding IRM helped to identify their personal motives and barriers of international mobility. Our coding process followed the *theoretical coding* principle of grounded theory (Glaser & Strauss, 1967; cf. Charmaz, 2006), starting with a very detailed 'line-by-line coding' (process and in-vivo coding). Then, we applied 'focused coding' by using the most significant or frequent initial codes and thus synthesizing larger segments of our data. In a next step, we grouped our codes into categories, specified their properties and established linkages between categories ('axial coding'). Finally, we refined our categories and memos and integrated them in a theory ('selective coding'). Through an iterative process, we constantly compared our different categories and interviews, adjusting the coding process as well as sampling strategy accordingly (i.e. *constant comparative method*). We continuously interrogated our data and our theory throughout the analytical process (i.e. *theoretical sensitivity*; Glaser & Strauss, 1967; cf. Charmaz, 2006; Shah & Corley, 2006).

### **5.5 A decision theory of international relocation mobility**

Our theory is shown in Figure 9. The theory explains employees' decision-making process regarding IRM. In contrast to past IRMR studies, we integrate the different antecedents of IRMR and assign them to the different phases of an employee's decision to relocate abroad. Moreover, our theory shows multi-causal effects, i.e. which factors influence employees' IRMR in an interrelated way. Our results also highlight the importance of individuals' perception of personal and situational variables for individuals' IRMR. In general, perception is "the selection and organization of environmental stimuli to provide meaningful experiences for the perceiver" (Nair, 2010, p. 104). An employee's perceived fit and perceived manageability of IRM determine whether an individual's basic IRMR results in a high motivation to relocate abroad at a specific time under specific situational conditions (situational IRMR). Further important individual-level variables (e.g. personal initiative and self-efficacy) and situational variables (e.g. location characteristics) influence this process.

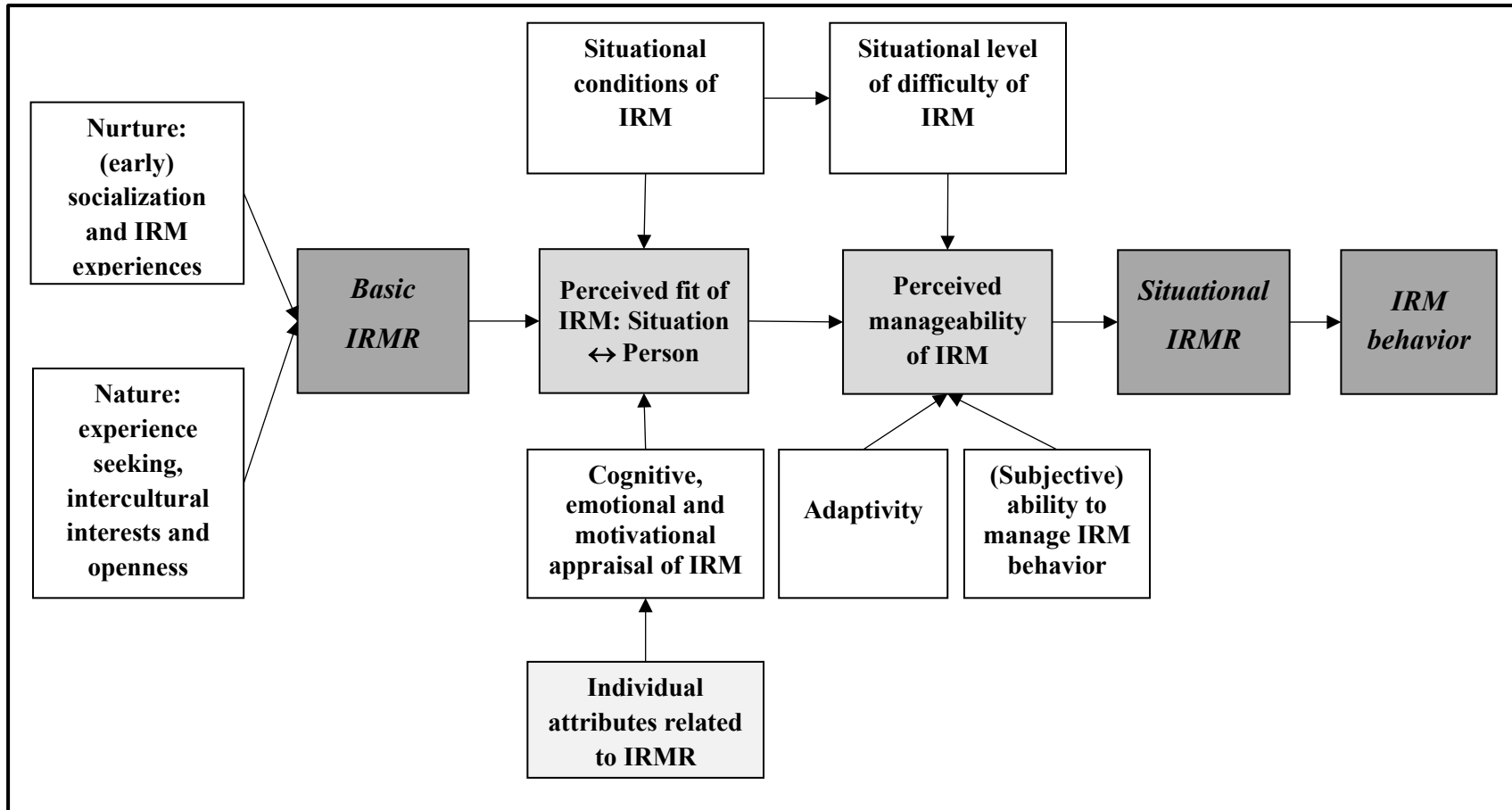


Figure 9: A decision theory at the example of IRM

### **5.5.1 Basic IRMR**

Our results indicate that some individuals have principally a higher readiness to relocate abroad (across situations and time points) than others. This basic IRMR (trait) is determined by an interplay of specific personality traits (nature) and early socialization and IRM experiences (nurture). Hence, an individual's basic IRMR is established in early years of life, but can also be sharpened later in life, e.g. by IRM experiences and the associated emotions such as enthusiasm. Individuals with a high basic IRMR often grew up in a multicultural environment (e.g. with parents of different nationalities) and thus, learned early in life that international mobility and living in between different cultures is 'normal'. Parents often served as role models in this process, e.g. by traveling to different and 'exotic' places. However, parents who showed no IRM behavior can also stimulate individuals to do the opposite, e.g. by showing high rates of international mobility later in life.

Another important environmental factor, which influences the basic IRMR, are the cultural, economic and political conditions under which individuals currently and permanently live. For instance, Germany is characterized by a high standard of living and a strong social infrastructure (e.g. systems of social security, education and health care) - especially if compared to developing countries (e.g. Ethiopia, standard of living) but also to other industrialized countries (e.g. USA, social security system). These structural aspects influence individuals' basic IRMR. Especially employees with children value the German social system and often would not leave Germany permanently. Social norms about international mobility also influence the basic IRMR. Today, international experience is socially desirable and society expects specific social groups (e.g. students and young professionals) to be internationally mobile. Additionally, there are also sub-rules or norms that detail why it is necessary to have international experience (e.g. for career advancement).

Individuals with a high basic IRMR can be characterized by a bundle of specific personality traits. First, they are often highly curious and addicted to making new experiences ("experience seeking"). The high thirst for adventure is satisfied by relocating to culturally distant places:

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*“I’m mobile by nature (laughs). I’m driven by the new, I have already realized after 2.5 years that Morocco starts getting boring. I need something new again. It’s the curiosity and the desire to experience the new, also new cultures. That’s what drives me.”* (female development aid worker, 26 years; cf. interview 9).

Moreover, individuals with a high basic IRMR often show an interest in other countries, cultures and languages. By living and not only spending their holidays in other countries, they want to learn more about the country’s culture, the people and their habits. Participants with high “intercultural interests” show a particular openness for other ways of thinking (e.g. by people from other cultures) and want to experience a country and its culture by themselves instead of being driven by stereotypes and prejudices. A general “openness” for change, new experiences or the influence of chance events is another trait which is characteristic for individuals with a high basic IRMR. These individuals are open for every opportunity to move abroad and often describe their life as a series of chance events. Instead of planning every future step precisely, they seem to be floating around life. Contrarily, individuals with a low basic IRMR often have a clear picture of their future life with distinct plans and goals. Those persons value a constant private and professional environment over making new experiences.

### ***5.5.2 First situational appraisal: Perceived fit of IRM***

The basic IRMR influences individuals’ IRM behavior independent of a concrete trigger or situation. As employees are confronted with a specific IRM opportunity, the situation itself and the strength of contextual conditions (regarding employees’ scope for action) determine, whether employees’ situational appraisal results in IRM behavior. In this phase of the decision-making process employees ask themselves, whether IRM fits to their current situation. Employees differ regarding several individual attributes (e.g. values), which influence their cognitive, emotional and motivational appraisal of IRM. If the situational conditions of IRM meet the individuals’ expectations (e.g. regarding specific locations of IRM), the perceived fit will be high and low otherwise. Our analysis shows that employees with a high basic IRMR

rather perceive a high fit, while those with a low basic IRMR would relocate abroad under specific situational conditions only. These observations suggest the following:

*Proposition 1: The basic IRMR as well as the interplay of individual and situational variables influence individuals' perceived fit of IRM.*

**Individual variables influencing the perceived fit of IRM.** *Individual attributes related to IRMR* can be differentiated into values, attitude, needs and motives, abilities and demographics (cf. Table 14). These individual attributes influence the individual's cognitive, emotional and motivational appraisal of IRM. We distinguish between perceived barriers, perceived advantages and motivators.

**Perceived barriers.** Our results reveal that employees differ in the way they perceive challenges associated with IRM. While the separation from hometown, family and friends is a barrier for some individuals, others state that their family and friends would not hinder them to relocate abroad, as they can easily stay in touch via modern telecommunication. Hence, it is a question of an employee's perception whether the challenges of IRM are felt as barriers (i.e. fears and concerns). In general, perceived barriers concern the employees' social environment, the possible life abroad and negative assumptions or stereotypes about other countries or cultures (cf. Table 14). A lack of social support (e.g. the partner is not willing to relocate abroad) can be a strong barrier for individuals, especially if they have a strong affiliation motive and value family life (cf. *individual attributes related to IRMR*).

*„My family is the most important thing to me. My wife would definitely have to be on board. I couldn't leave my wife and move abroad for a good job on my own. This would work for a distinct and limited time-frame, where you have a long-distance relationship for half a year, for example, but then I would return. I'm not a person who only does his own thing without thinking of his partner.“* (electrical engineer, 34 years; cf. interview 3)

Phase of an employee's decision-making process regarding IRM	Influencing factors
<b>Basic IRMR</b>	
<i>Nature</i>	<ul style="list-style-type: none"> <li>• Experience seeking</li> <li>• Intercultural interests</li> <li>• Openness</li> </ul>
<i>Nurture</i>	<ul style="list-style-type: none"> <li>• Early socialization</li> <li>• IRM experiences</li> <li>• Current and permanent place of residence: Cultural, political and economic conditions; social norms</li> </ul>
<b>First situational appraisal: Perceived fit of IRM</b>	
<i>Individual variables: Individual dispositions associated with IRMR</i>	<ul style="list-style-type: none"> <li>• Values: e.g. importance of home, family and friendship</li> <li>• Attitudes: e.g. emotional cultural distance</li> <li>• Needs and motives: e.g. affiliation motive</li> <li>• Abilities: e.g. language abilities</li> <li>• Demographics: e.g. family status</li> </ul>
<i>Individual variables: Cognitive, emotional and motivational appraisal of IRM</i>	<p><i>Perceived barriers</i></p> <ul style="list-style-type: none"> <li>• Social environment: separation from hometown, family and friends; family's willingness to relocate abroad; having children in a specific age; finding a job for the partner abroad; providing health care for family members</li> <li>• Possible life abroad: language abilities, establishing a new social environment abroad</li> <li>• Stereotypes and negative assumptions about other countries / cultures</li> </ul> <p><i>Perceived advantages</i></p> <ul style="list-style-type: none"> <li>• Positive emotions: e.g. enthusiasm</li> <li>• Positive assumptions / attitudes: e.g. about IRM or other countries / cultures</li> </ul> <p><i>Motivators</i></p> <ul style="list-style-type: none"> <li>- <i>Pull factors:</i> <ul style="list-style-type: none"> <li>• Having a concrete job offer abroad</li> <li>• Following the partner who relocates or already lives abroad</li> <li>• Learning more about own personal roots</li> <li>• Attractive locations</li> <li>• Personal / professional development</li> <li>• Financial benefits</li> </ul> </li> <li>- <i>Push factors:</i> <ul style="list-style-type: none"> <li>• Dissatisfaction with current place of residence or work</li> <li>• Threat of unemployment</li> <li>• Organizational norms and sanctions</li> </ul> </li> </ul>
<i>Situational variables</i>	<ul style="list-style-type: none"> <li>• Organizational demands, limits and facilities: time frame, location, amount of (financial and non-financial) support, job content abroad</li> <li>• Occupational demands, limits and facilities: job-related opportunities and problems / restrictions</li> <li>• Location: characteristics (e.g. personal safety, standard of living), visa issues</li> <li>• Life phase and chance events</li> </ul>
<b>Second situational appraisal: Perceived manageability of IRM</b>	
<i>Adaptivity</i>	<ul style="list-style-type: none"> <li>• Uncertainty tolerance</li> <li>• Calm</li> <li>• Optimism</li> <li>• Flexibility</li> </ul>
<i>(Subjective) ability to manage IRM behavior</i>	<ul style="list-style-type: none"> <li>• Personal initiative</li> <li>• Self-efficacy</li> </ul>
<b>Situational IRMR &amp; IRM behavior</b>	

**Table 14: Different influencing factors assigned to the different phases of an employee's decision-making process regarding IRM**



The situational conditions of IRM influence whether perceived barriers negatively influence the perceived fit. Employees who reject specific locations because of high emotional cultural distance (cf. *individual attributes related to IRMR*) would perceive a low fit, if the company's portfolio only includes undesirable locations. We therefore deduce the following propositions:

*Proposition 2a: Perceived barriers regarding IRM are influenced by individual attributes related to IRMR.*

*Proposition 2b: The situational conditions of IRM influence whether perceived barriers regarding IRM negatively influence individuals' perceived fit of IRM.*

Perceived advantages. Individuals also show positive emotions (e.g. enthusiasm) regarding IRM. Especially those individuals who have already lived and worked abroad perceive IRM as enriching and stimulating. Employees' positive beliefs about specific locations are often influenced by other person's positive IRM experiences or by media. Individual attributes related to IRMR (e.g. attitude towards home as not being bounded to a specific place) also influence employees' perceived advantages (e.g. enthusiasm about IRM). In contrast to perceived barriers, perceived advantages always positively influence the perceived fit.

*Proposition 3a: Perceived advantages of IRM are influenced by individual attributes related to IRMR.*

*Proposition 3b: Perceived advantages of IRM positively influence individuals' perceived fit of IRM.*

**Motivators.** Individuals differ regarding the motives or reasons that drive them to relocate abroad. We distinguish between pull and push factors. *Pull factors* motivate employees to relocate to other (specific) countries by attracting them. Pull factors can be further differentiated into: job offer, partner, personal roots, attractive locations, personal and / or professional development and financial benefits (cf. Table 14). Employees perceive a high fit if the situational conditions of IRM (e.g. job content abroad) satisfy their motives (e.g.

professional development). Some individuals only perceive a high fit if the job offer abroad is financially motivating:

*“A job offer is always connected to taxes. For example, Holland. As the job offer was on the table, the agency and I talked about how the tax system in Holland is useful for freelancers. How much net income is left over from gross income?”* (freelance IT-consultant, 46 years; cf. interview 24).

Pull factors can also have a neutralizing effect on employee’s perceived barriers and thus positively influence the perceived fit. For instance, a partner who has a high basic IRMR can be the driving force behind an individual’s international mobility, reducing uncertainty and perceived barriers. These observations thus suggest the following:

*Proposition 4: Situational conditions of IRM influence, whether pull factors positively influence individuals’ perceived fit of IRM.*

*Push factors* force individuals to relocate to another country and can be split up into dissatisfaction (e.g. about current place of residence, work) and threat of unemployment (cf. Table 14). Moreover, organizational pressure such like norms and sanctions concerning IRM can also force employees to move abroad:

*“I think you can say no for one or two times. But if you refuse more often, then nothing will happen anymore. Then you’re off. Some of my colleagues refused vehemently and were thus pushed aside.”* (mechanical engineer, 33 years; cf. interview 21).

If the contextual conditions are strong (e.g. strong organizational norms and sanctions), resulting in a low scope for action, employees are forced to relocate abroad, even if their perceived fit is low. This suggests the following:

*Proposition 5: Push factors can force individuals to relocate abroad, even if individuals’ perceived fit of IRM is low.*

**Situational variables influencing the perceived fit of IRM.** Situational conditions of IRM differ largely and, thus, put different demands or constraints on employees (cf. *situational level of difficulty of IRM*, Figure 9). For instance, some employees are sent abroad by their employers, receiving high financial and non-financial support, whereas others have to initiate international relocation on their own. In the following, we will describe specific situational conditions of IRM.

**Organizational demands, limits and facilities.** Organizations influence the situational conditions of IRM by setting limits to the period and location of IRM. In this way, they influence the contextual conditions of IRM and employees' scope for action (cf. organizational norms and sanctions). Individuals form expectations about the period (e.g. relocating abroad for a limited period of time only) or location of IRM (e.g. relocating to specific countries only). If the organization fulfills these individual expectations, the perceived fit will be high. However, organizations may not only restrict IRM behavior, but also facilitate international moves, e.g. by offering international assignments and by providing organizational support. If individuals expect to receive organizational support, the perceived fit depends on whether the organization is willing and able to provide such support. Finally, organizations have an influence on the job content abroad. If individuals want to develop professionally by relocating abroad (cf. *motivators*), a high perceived fit depends on whether the job abroad is personally interesting and challenging (e.g. by assuming more responsibility).

*Proposition 6: Organizations limit or facilitate the situational conditions of IRM and hence influence individuals' perceived fit of IRM.*

**Occupational demands, limits and facilities.** The situational conditions of IRM and the perceived fit also depend on occupational factors. Our sample covers a broad range of different occupations such as self-employed managers, engineers, a nurse working as a school bus driver, a female physician, among others. Instead of discussing the influencing factors of each of these jobs in detail, we focus on specific job characteristics that we found may facilitate or complicate the situational conditions of IRM. For instance, self-employment can facilitate international moves, as it often allows individuals to choose their place of work (e.g. location). Other jobs put high flexibility and (international) mobility demands on individuals such as freelance work,

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consultancy and developmental work. In these professions, individuals' scope for action regarding IRM is rather low, as their job forces them to be internationally mobile. Others have difficulties to find a suitable job abroad that fits to their profession (e.g. teacher with a specific combination of subjects). Summing up, we propose the following:

*Proposition 7: Occupational factors complicate or facilitate the situational conditions of IRM and hence influence individuals' perceived fit of IRM.*

Job-related opportunities (e.g. better working conditions for physicians and care staff in Scandinavian countries), but also job-related problems or restrictions (e.g. recognition of job by immigration offices abroad), are often connected to specific locations. In some countries, individuals with specific professions have difficulties in getting a suitable work permit. The contextual conditions again limit their scope of action and hence decrease their perceived fit.

*"In Singapore, I wasn't allowed to work, because I had no work permit. Times were different then. You need a work permit, but since I was a nurse, they would never take me. Alternatively, I should have had to speak at least one Chinese dialect and then it was completely over."* (nurse, 50 years; cf. interview 14).

Individuals also relocate to specific countries to develop professionally (e.g. a confectioner who relocates to Switzerland or France) and gain career capital abroad (e.g. Dickmann & Harris, 2005). Summing up, this suggests the following:

*Proposition 8: Job-related benefits and problems, being connected to specific locations, influence individuals' perceived fit of IRM.*

**Location.** Locations differ regarding several characteristics (e.g. standard of living or personal safety) and, thus, influence the perceived fit. For instance, individuals usually must fulfill specific (job-related) requirements to receive an entry permit to specific locations (cf. immigration policies). While organizations usually manage visa issues for their international

assignees, self-initiated expatriates must organize their immigration by themselves. While EU countries require no visa from EU citizens with employment status, employees who want to relocate to non-EU countries must meet stringent requirements (e.g. regarding occupation and income). Based on *individual attributes related to IRMR* (e.g. emotional cultural distance), individuals form specific expectations regarding possible locations of IRM and their characteristics. Employees also consider their social environment (e.g. partner, children), when building preferences regarding possible locations abroad (e.g. relocating to countries with a good education system only). If the situational conditions of IRM (e.g. company's portfolio of destination countries) fulfill the individual's expectations regarding possible locations and their characteristics, the perceived fit will be high and low otherwise.

*Proposition 9: Locations and their characteristics influence individuals' perceived fit of IRM.*

***Life phase / -situation and chance events.*** Our results show that the perceived fit also depends on an individual's phase of life. Even individuals who have a high basic IRMR can perceive a low fit in specific phases of their life (e.g. during pregnancy or after a long series of international moves). Moreover, in specific phases of life (such as starting a family), the perceived fit of many employees decreases, while it increases again in other life phases (e.g. when children are grown up). The perceived fit has a peak during individuals' youth (i.e. after finishing school, during or after their studies or as young professionals).

*Proposition 10: Individuals' life phase or situation influences individuals' perceived fit of IRM.*

Chance events either facilitate or complicate the situational conditions of IRM. For instance, job opportunities abroad often arise by chance and can stimulate employees' decision-making process regarding IRM:

*“That was coincidence, [...]. I simply read the newspaper. I also looked for a job in Vienna. But then I read Ireland and thought: yes, I always wanted to*

*go abroad. So I called and it easily worked out. [...]. And so it was Ireland. If I found the same job in England or France, I would have gone there.”*  
(university secretary, 49 years; cf. interview 17).

Other chance events such as illness of close relatives can also complicate the situational conditions of IRM.

### **5.5.3 Second situational appraisal: Perceived manageability of IRM**

At this phase of the decision-making process employees face the question, whether they are able to successfully manage an international relocation. The perception of manageability of IRM largely differs between individuals. While some individuals perceive specific situational conditions of IRM (e.g. low organizational support) as unproblematic and manageable, others would reject their IRM plans in the same situation. The perceived manageability of IRM depends on an individual's perceived fit as well as the (subjective) ability to manage IRM (i.e. self-efficacy and personal initiative) and a group of personality traits we subsume under adaptivity.

*Proposition 11: Individuals' perceived fit of IRM influences individuals' perceived manageability of IRM.*

**(Subjective) ability to manage IRM behavior.** The subjective ability to manage IRM behavior subsumes personal initiative and self-efficacy regarding IRM.

**Personal initiative.** Employees' personal initiative influences whether they perceive IRM as manageable, also under suboptimal situational conditions (e.g. a low perceived fit). The personal initiative influences, whether employees decide to relocate abroad despite (perceived) barriers (e.g. partner who is not willing to relocate abroad).

*“[...] and I would have enjoyed relocating abroad, and when my daughter was like 15, I would have enjoyed moving abroad with her, but this didn't*

*work out either. So actually, I note that I was discouraged from my environment to do it. And I would still go abroad, but my husband does not want to join.”* (female physician, 48 years; cf. interview 4).

Individuals, who apply for jobs abroad on their own, also show a high personal initiative regarding IRM. In the preparation or planning of an international move, individuals also need personal initiative to overcome barriers of IRM (e.g. long waiting time for immigration papers). Moreover, individuals must anticipate problems that might occur abroad and develop respective action strategies.

*Proposition 12: Individuals’ personal initiative regarding IRM influences individuals’ perceived manageability of IRM.*

**Self-efficacy.** The self-efficacy regarding IRM, i.e. the subjective ability to successfully implement IRM behavior, also influences the perceived manageability of IRM. Successful performance accomplishments strengthen an individual’s self-efficacy. Employees with many past IRM experiences often perceive IRM as unproblematic and manageable, while a low self-efficacy often resulted from a lack of IRM experiences. IRM experiences also strengthen the self-efficacy to communicate in a foreign language, which again influences individuals’ perceived manageability of IRM.

*“And until then it works with gestures and hand signs, you always manage to communicate. By now I was able to communicate in all the countries I’ve been.”* (female development aid worker, 26 years; cf. interview 9).

Summing up, we posit the following:

*Proposition 13: Individuals’ self-efficacy regarding IRM influences individuals’ perceived manageability of IRM.*

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**Adaptivity.** A group of personality traits which we subsumed under the term “adaptivity” also influence the perceived manageability of IRM. International relocation can be regarded as an important career transition, in which the individual is confronted with unfamiliar and complex problems (e.g. adapting to a new culture). The situational conditions of IRM can change (e.g. amount of organizational support, probability of finding a job abroad) and lead to a low perceived fit. Individuals with a high uncertainty tolerance, a high calm and optimism better cope with these changes and still perceive IRM as manageable. This also concerns the preparation phase of an international move, in which individuals often have to cope with different obstacles (e.g. waiting for immigration documents). Moreover, job offers abroad often arise by chance and thus require high levels of flexibility from individuals, especially if the preparation time is short. Summing up, our observations suggest the following:

*Proposition 14: Individuals’ adaptivity influences individuals’ perceived manageability of IRM.*

#### **5.5.4 Situational IRMR and IRM behavior**

The situational IRMR reflects an individual’s motivation to relocate abroad at a specific point in time under specific situational conditions. In contrast to the basic IRMR, the situational IRMR has a rather temporary nature and is open to situational influences. A high situational IRMR results if individuals perceive IRM as manageable, i.e. if their self-efficacy and personal initiative regarding IRM are high enough to cope with the perceived fit conditions and if they show a high adaptivity. The situational IRMR reflects a goal striving process (the goal is IRM behavior). During this process, many obstacles and problems (e.g. visa problems or illness) can occur which the individual must deal with. Hence, individuals need a high personal initiative. Moreover, individuals must anticipate challenges that might occur abroad (e.g. regarding work regulations in specific countries) and develop plans how they will deal with these problems.

*Proposition 15: Individuals’ perceived manageability of IRM influences individuals’ situational IRMR.*



## 5.6 Discussion

Our results shed light to the definition and conceptualization of the IRMR construct. Moreover, we created a theoretical framework that explains an employee's decision-making process regarding IRM comprehensively. We assigned the influencing factors to the different decision phases and showed multi-causal effects, i.e. which factors interrelate and affect IRMR. Building on recent findings on the antecedents of IRMR (e.g. de Eccher & Duarte, 2016), our theory highlights the importance of employees' perception or subjectivity for IRMR.

### 5.6.1 *Theoretical implications*

Our theoretical framework fundamentally enhances existing IRMR research and gives rise to important propositions. Past IRMR research has often referred to the theory of planned behavior (Ajzen, 1991) to conceptualize IRMR as a behavioral intention (e.g. Boies & Rothstein, 2002; Froese et al., 2013). However, our results show that an employee's decision-making process regarding IRM is more complex.

First, our theory includes a basic IRMR (trait). Existing decision theories have not considered the influence of rather stable traits on individuals' decision-making processes (e.g. Ajzen, 1991; Heckhausen & Gollwitzer, 1987; Perugini & Bagozzi, 2001). The model of goal-directed behavior (cf. Perugini & Bagozzi, 2001) distinguishes between desires and intentions as important antecedents of goal-oriented behavior. In contrast to intentions, which reflect an individual's concrete decision to implement a specific behavior in the future, desires are rather abstract and unspecified, e.g. regarding the time frame for action implementation (Perugini & Bagozzi, 2004). According to the Rubicon model of action phases (Heckhausen & Gollwitzer, 1987), desires (e.g. the diffuse idea to work abroad) are evaluated in the first phase of an individual's decision-making process, while intentions reflect the end product of this deliberating phase. Our theory shows that within the context of IRM a higher granularity of the first decision phase is needed. Based on individual and situational variables, employees first evaluate whether IRM fits to their current situation. Then, they face the question whether they are able to successfully manage IRM behavior. Afterwards, they decide to relocate abroad under specific situational conditions, i.e. develop a situational IRMR (intention). Next, they start a

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concrete planning phase (cf. Heckhausen & Gollwitzer, 1987) and finally implement IRM behavior.

Our theory contains important elements of existing decision theories (e.g. Ajzen, 1991; Perugini & Bagozzi, 2001), yet further specifies in which phases of the decision-making process regarding IRM particular influencing factors become evident. For instance, our theory shows that attitudes (e.g. towards IRM behavior) impact employees' cognitive, emotional and motivational appraisal of IRM, which then influences the perceived fit. Social norms determine the basic IRMR and the perceived behavioral control or self-efficacy influences the perceived manageability of IRM (cf. Ajzen, 1991). By this means, we also contribute to IRMR research that has rather focused on the influence of specific factors on IRMR (e.g. demographics) instead of describing cause-effect relations (e.g. Landau et al., 1992).

Our results also show that an employees' perception or subjectivity plays a major role for IRMR. This contradicts past research on IRMR which has focused on objective influencing factors (e.g. marital status, number of children), yet neglected to ask employees about their individual perception of specific influences (e.g. if they perceive having a family as barrier of IRM). For instance, based on individual attributes such as the emotional cultural distance (Azar, 2014), employees perceive locations and their characteristics quite differently. This is in line with empirical results by de Eccher and Duarte (2016), who revealed that employees' language skills influence their evaluations of specific countries in terms of safety and cultural attraction. In line with past IRMR and international mobility research (e.g. Andresen & Margenfeld, 2015; Dickmann et al., 2008; van der Velde et al., 2017), we also found that an employee's social environment (e.g. partner and children) plays a crucial role for an individual's decision to relocate abroad. However, our theory further specifies, in which phase of an employee's decision-making process the influence of the social environment becomes evident (cf. perceived barriers).

While personality traits have seldom been in the focus of past IRMR research (e.g. Otto & Dalbert, 2012), our theoretical framework highlights the importance of personality traits for an individual's basic IRMR and perceived manageability of IRM. For instance, experience seeking parallels a personality trait called 'sensation seeking', i.e. "the need for varied, novel, and complex sensations and experiences, and the willingness to take physical and social risks

for the sake of such experiences.” (Zuckerman, 1979, p. 10). However, it is questionable, whether individuals would also take personal risks for making new experiences abroad (e.g. by relocating to high-risk countries). A high basic IRMR is also linked to a high interest in and openness for other countries and cultures. In contrast to spending vacations abroad, living in a foreign country is often connected to learning more about the people and their habits (cf. ‘explorer’ metaphor, Richardson & McKenna, 2000). Employees with a high basic IRMR are also open for the influence of chance events. According to the Chaos Career Theory individuals should remain open for chance influences and be flexible to adapt their career path accordingly (Bright & Pryor, 2011). Likewise, Doherty et al. (2011) also stress the importance of serendipity for careers in general and especially for self-initiated expatriates whose (job) opportunities rather arise by chance than by a concrete plan. Career construction theory (Savickas, 2005) assumes that individuals must constantly adapt to environmental changes during their career to remain socially integrated. People differ in their willingness (i.e. adaptivity) and ability (i.e. adaptability resources) to adapt to work changes (cf. Hirschi, Herrmann, & Keller, 2015). Likewise, our results show that individuals differ in their willingness to adapt to changes associated with international relocation, which plays an important role for individuals’ perceived manageability of IRM.

Finally, the personal initiative regarding IRM plays a major role to develop a high situational IRMR, especially under suboptimal situational conditions (e.g. a low perceived fit). Past research also revealed that personal initiative is an important work behavior that is positively linked to individual and organizational performance measures (Baer & Frese, 2000; Fay & Frese, 2001). According to Frese and Fay (2001), personal initiative consists of three components: self-starting (i.e. an employee acts without having an explicit instruction and pursues self-set goals), proactivity (i.e. employees anticipate future problems and opportunities and acts immediately) and persistence (i.e. employees overcome barriers and resistance in pursuit of a goal by generating solutions for their problems). To the best of our knowledge the personal initiative construct has not been applied to the IRMR context before.

### 5.6.2 *Practical implications*

Based on our results, companies can improve the assessment, selection and development of expatriates (CARTUS, 2014). Our comprehensive theoretical framework allows companies to develop strategic measures that can be applied at the right time, depending on an employee's phase of decision-making regarding IRM.

Expatriate selection is one of the key areas MNCs worldwide want to improve in (CARTUS, 2014). However, MNCs worldwide seldom apply formal procedures to select candidates for international postings (Brookfield GMAC, 2016). Since the basic IRMR plays an important role for the decision-making process regarding IRM, companies should assess employees' basic IRMR and its determinants (e.g. specific personality traits) at an early stage. Measuring these traits when individuals first apply for a job in the organization, helps to increase the internal pool of expatriation candidates who have an optimal level of IRMR (cf. Mol et al., 2009). It might also be valuable to assess individual attributes related to IRMR (e.g. emotional cultural distance and language abilities) as these influence employees' cognitions, emotions and motivation regarding IRM as well as the perceived fit. Since adaptivity and the (subjective) ability to manage IRM play a central role for a high situational IRMR, companies should also measure these individual characteristics. Questionnaires can be used to measure applicants' basic IRMR and further important individual-level variables.

Depending on the employee's phase of decision-making regarding IRM, companies can then adjust their developmental actions accordingly. In the 'perceived fit' phase, companies should try to match the individual's expectations regarding IRM with the situational conditions of expatriation (e.g. regarding possible locations). To identify an employee's cognitions, emotions and motivation regarding IRM, a suitable instrument can be interviews. In this way companies will learn about the employee's fears, concerns and motives concerning IRM. For instance, attractive career perspectives might result in a high perceived fit for employees who want to develop professionally by relocating abroad, but would not increase the IRMR of an individual who is concerned about the influence of IRM on his or her partner's career. In the latter case, companies should focus on family-related measures, such as providing organizational support for the trailing spouse (e.g. job search abroad; cf. McNulty, 2012). Research results indicate that especially professional support (e.g. job search and career support

for the expatriate partner) and social support (e.g. fostering expatriate family's integration abroad) are important for the trailing spouse's acculturation abroad. However, most companies provide practical support only (e.g. pre-assignment visit to the host location; cf. McNulty, 2012).

In the 'perceived manageability' phase, companies should try to strengthen employee's adaptivity, self-efficacy and personal initiative, e.g. by providing cross-cultural trainings (Caligiuri & Tarique, 2012). This kind of training might be valuable to increase the self-efficacy of those employees who are afraid of having intercultural problems abroad. However, interviews can also reveal that the employees' low self-efficacy results from the lack of ability to speak the host country's language. In this case, language trainings or possibilities to interact with employees speaking the host country's language may help to overcome these concerns and strengthen the employee's self-efficacy (cf. Caligiuri & Tarique, 2012). If employees have already developed a situational IRMR and start to plan their international move, companies can provide further support, e.g. by managing visa issues for their employees or organizing the move.

### ***5.6.3 Limitations and directions for future research***

The results of our study must be viewed in light of its limitations. This concerns the generalization drawn from our non-randomly selected sample (cf. Shah & Corley, 2006). The employees in our sample cannot be representative of the diversity of all people living in Germany or even other countries. Our theoretical framework applies to this special group of employees, who are currently and permanently living in Germany. To prove the transferability of our results to other contexts, our theory should be tested on other samples, also in different countries (e.g. cross-cultural studies). Since we aimed to develop a theory that applies across a variety of occupational contexts, we allowed for differences in terms of participants' occupation. However, our results also highlight the importance of job-specific influences for employees' IRMR. Future studies should focus on a specific professional group of employees (e.g. physicians) and investigate job-specific influencing factors (e.g. factors facilitating or limiting IRM behavior) in more detail.

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We applied a cross-sectional design. However, many variables in our theory have a temporary nature or change over the course of an employee's life (e.g. perceived fit). Thus, we recommend future studies to apply a longitudinal design. It would also be interesting to investigate the stability of the basic IRMR over employees' life course. Another concern may arise by the influence of memory on data collected as participants recalled motives for their past IRM experiences. However, we were explicitly interested in employees' interpretations and perceptions that form the basis of our theoretical framework about employees' IRMR (cf. Charmaz, 2006). Moreover, researchers found that individuals recall facts of their personal past quite reliably (cf. Cerdin, Diné, & Brewster, 2014).

Since past studies mainly focused on objective influencing factors on IRMR, future studies must concentrate on employees' perception, e.g. regarding perceived barriers and advantages. This also concerns employees' perception of location factors that is often influenced by stereotypes and prejudices or language skills (de Eccher & Duarte, 2016). Terrorism, which has become a common fear in Western societies, can also be perceived as a barrier (e.g. Bader & Berg, 2013; Konopaske & Werner, 2005). Future IRMR research could investigate the influence of a country's safety level on employees' IRMR. Moreover, personality traits such as experience seeking coupled with a high basic IRMR could also be dysfunctional for companies, as those employees may want to change countries and employers frequently. Identifying the optimal level of basic IRMR is another interesting path for future research.

## **5.7 Conclusions**

Based on an inductive approach we developed a comprehensive theoretical framework about an employee's decision to relocate abroad. Our theory describes, in which phase of the decision process regarding IRM the different antecedents of IRMR become evident and how they interrelate and affect employees' IRMR. Our results reveal that IRMR must be distinguished into a stable basic IRMR and a temporary situational IRMR. Key determinants for the situational IRMR are the perceived fit and the perceived manageability of IRM. Personal initiative and self-efficacy play a major role in this process as both influence whether employees are (convinced to be) able to pursue IRM as a self-set goal, even under suboptimal situational

conditions (e.g. a low perceived fit). A high adaptivity helps to handle the complexity and change associated with IRM and thus leads to highly perceived manageability of IRM. Future research should test our theoretical framework and propositions empirically. Companies could improve their expatriation selection and development processes by applying the IRMR framework. More specifically, companies could try to select those employees with a high basic IRMR and specific personality traits. Additionally, companies should assess employees' cognitions, emotions and motivations regarding IRM to adjust their developmental actions as well as expatriation policies accordingly, thus reducing potential costs of expatriate failure.

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