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Recognizing the important role of self-initiated expatriates in effective global talent management

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ABSTRACT

The effective management of talent on a global scale represents a critical challenge for today's organizations. Beyond considerations about traditional company-assigned expatriates, this paper provides a valuable examination of global talent management issues involving self-initiated expatriates, an important source of global talent increasingly available in host country labor markets that has only relatively recently come to the attention of researchers. The paper discusses how central elements of talent management (i.e., identifying, recruiting, and selecting talent from the external labor market; developing employees; managing talent flows; ensuring retention of talented employees) can apply to the effective utilization of self-initiated expatriates, with direct implications for guiding the future work of practitioners and researchers alike.

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1. Introduction

The ever-increasing focus on the effective management of people who represent special significance to their respective organization's success has been perhaps one of the most important developments in human resource management (HRM) over the past 15 years (Collings, 2014; Sparrow, Scullion, & Tarique, 2014). Adopting a moniker of Talent Management (TM), this focus has been at the center of attention of both HRM scholars and practitioners. Starting with the work by McKinsey consultants (Michaels, Handfield-Jones, & Axelrod, 2001), the field of TM has gained much respect and attention across corporate functions, industries, and national boundaries. This statement is well supported by a recent PWC Global CEO Survey, which reports that TM remains the number one priority for 78% of companies worldwide (PWC, 2012).

Despite the fact that TM as an academic field is nearing its adolescence, there is still active discussion in regard to the understanding of the concept, as well as its intellectual boundaries. Some scholars perceive TM from a primarily human capital perspective (Cappelli, 2008), while others view it as mainly an approach with talent as the source of organizational success (Mellahi & Collings, 2010). Still other scholars see it as the presence of key HRM policies and practices that are tightly linked to corporate strategy (Farndale, Scullion, & Sparrow, 2010; Kim & Scullion, 2011). Since there is no one "ultimate answer" to the conceptualization of TM, the field still remains rather fuzzy, as both academics and practitioners are trying to find consensus on precise definitions of talent and talent management (Collings, 2014; Collings & Scullion, 2009; Mellahi & Collings, 2010; Vaiman & Holden., 2013).

The multitude of approaches to TM has led to a variety of definitions of the concept itself, which, however, does not prevent us from distinguishing one theme common to all of them. This theme focuses on two important dimensions — the first includes key individuals with a high level of talent (measured by their knowledge, skills, and abilities) that are employed in key roles and add value to

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the organization, while the second dimension involves additional HRM policies, procedures, and techniques that are effectively used to manage such talented individuals (Tarique & Schuler, 2012; Vance & Vaiman, 2008). It is, therefore, possible to use some sort of a blend of Tarique and Schuler (2010, 2012) and Vance and Vaiman (2008) definitions of both talent and TM, which refers to talent as key people in critical job roles, as well as employees who possess or are pursuing specialized and in-demand knowledge and skills; and identifies TM as a set of organizational processes designed to attract, develop, mobilize, and retain key people.

More specifically, TM can be seen as a meaningful set of activities that usually revolve around the following (Sparrow, Hird, & Balain, 2011; Tarique & Schuler, 2012):

A. Identifying, recruiting, and selecting talent from the external labor market.
B. Identifying key internal talent (will not be considered for the purposes of this paper).
C. Developing employees.
D. Managing talent flows, including facilitating the movement of talented individuals across regions or countries.
E. Ensuring retention of talented employees.

With the reality of ever increasing and inexorably advancing forces of globalization, our more accurate understanding of the concept of talent management lies within a global context. This broader perspective of global talent management (GTM) includes the above basic characteristics of TM, yet are at play within a transnational and global field of exponentially greater variables, complexities, and interdependencies (Bruning & Tung, 2013; Farndale, Avinash, Sparrow, & Scullion, 2014; Minbaeva & Collings, 2013). Within GTM, multinational organizations face the ongoing challenge of achieving a strategic balance between local adaptation and global coordination and integration of their business processes and associated talent management practices (Sidani & Al Ariss, 2014).

Much already has been written on the importance of talent management for various groups of employees, such as domestic employees and those staffing foreign operations. Recent work has examined company-assigned expatriates within GTM as involving high-potential talent development and global careers management (Al Ariss, 2014; Cerdin & Brewster, 2014). In this paper, however, we would like to turn our attention to a somewhat neglected but certainly important source of global talent – namely, self-initiated expatriates – and outline important issues pertaining to managing their talent in a global context. In particular, we will touch upon each of the aforementioned talent management activities and discuss their applicability to self-initiated expatriates. First, however, we will introduce the concept of self-initiated expatriation and delineate its boundaries.

2. Self-initiated expatriates (SIEs)

The phenomenon of self-initiated expatriation is not new; SIEs of some sort have been around for a long time. For example, since medieval times, craftsmen in France, German-speaking and other countries, were required to spend several years traveling and practicing their newly learned craft. This activity also involved crossing borders. A famous book describing a journeyman's travels is Goethe's "Wilhelm Meisters Wanderjahre". Journeymen's travels abroad were not necessarily voluntary and today's SIE's motives equally may or may not involve a sense of inevitability. What is new is the scholarly attention that SIEs have received recently resulting in reviews of the field (Al Ariss & Crowley-Henry, 2013; Doherty, 2013), a special journal issue (Doherty, Richardson, & Thorn, 2013a, 2013b), and two edited volumes (Andresen, Al Ariss, & Walther, 2012a; Vaiman & Haslberger, 2013).

According to the United Nations Organization, 232 million people were international migrants in 2013. This figure is up from 154 million in 1990. Only about 7%, or 15.7 million, were refugees in 2013. Most international migrants, 125 million, live in Europe or North America (United Nations, 2013a, 2013b). About one-fifth of international migrants are highly skilled (IOM, 2013). In the OECD countries[1] there are just below two million temporary worker migrants. While this group includes workers who are not SIEs, the available data indicate that the number of SIEs is far from small or negligible, probably running into tens or even hundreds of thousands in the OECD countries alone (OECD, 2013).

Contemporary SIEs are a diverse group such as 'overseas experience (OE)' seekers (Inkson & Myers, 2003; Myers, 2011), young graduates (Tharenou, 2003), English teachers (Fu, Shaffer, & Harrison, 2005), academics (Isakovic & Whitman, 2013; Richardson, 2006; Richardson & Mallon, 2005; Richardson & McKenna, 2006), volunteer workers (Hudson & Inkson, 2006), nurses (Bozionelos, 2009), doctors (Nolan & Morley, 2014), and business professionals (Fitzgerald & Howe-Walsh, 2008; Jokinen, Brewster, & Suutari, 2008; Lee, 2005; Scurry, Rodriguez, & Bailouni, 2013; Suutari & Brewster, 2000).

As of yet, there is no standard definition of the term "self-initiated expatriate". Commentators stress the need for such a standard (Doherty, 2013; Doherty et al., 2013a). However, there is disagreement in attempts at definition, such as whether the intention to stay for a limited time should be included as a criterion (cf. Andresen, Bergdolt, & Margenfeld, 2012b; Andresen, Bergdolt, Margenfeld, & Dickmann, 2014; Cerdin & Selmer, 2014). There also is a tension between ever-finer distinctions of SIE sub-types (cf. Richardson, McKenna, Dickie, & de Gama, 2013) on the one hand, and a wider understanding of self-initiated international mobility that includes immigrants (Cerdin & Brewster, 2014), on the other. Self-initiated mobility is a still fuzzy segment on the entire range of international movement that goes from travelers to permanent migrants (Al Ariss & Crowley-Henry, 2013; Doherty et al., 2013a, 2013b; Welch & Worm, 2006). Much of the earlier literature to date has focused on SIEs from 'Western', developed countries, although in recent years there have been studies including other nationalities as well (Al Ariss, 2010; Al Ariss & Özbilgin, 2010; Beitin, 2012; Cao, Hirschi, & Deller, 2013; Cerdin, Diné, & Brewster, 2014; Guo, Porschitz, & Alves, 2013).

[1] Australia, Austria, Belgium, Canada, Chile, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Israel, Italy, Japan, Korea, Luxembourg, Mexico, Netherlands, New Zealand, Norway, Poland, Portugal, Slovak Republic, Slovenia, Spain, Sweden, Switzerland, Turkey, United Kingdom, United States.

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For our purposes, Cerdin and Selmer's (2014: 1290) definition criteria are the most useful: "(a) self-initiated international relocation, (b) regular employment (intentions), (c) intentions of a temporary stay, and (d) skilled/professional qualifications."

In principle, SIEs have a special position in organizations, enabling them to play a bridge-building role. As local hires with non-local passports and perspectives, they are uniquely situated to facilitate cross-cultural understanding and an international outlook in their workplaces. This capability is something that organizations often strive for but find difficult to staff appropriately (cf. Adler, 2002; Stroh, Black, Mendenhall, & Gregersen, 2005). A recent theoretical contribution considers the suitability of SIEs to stand in for assigned expatriates (AE) (Tharenou, 2013). The author suggests that for some assignment purposes such as technical/specialist or lower and middle management roles SIEs are suitable, while for others such as control, coordination, or transfer of firm-specific knowledge they are not. SIEs provide unique challenges for HR and talent management (Doherty & Dickmann, 2013) in an environment that already is marked by potential tensions between local and expatriate employees (Toh & DeNisi, 2003). Overall, there is a need to find out more about the utility of SIEs to organizations (Doherty, 2013).

Several authors have reviewed the state of the field and proposed research agendas (Al Ariss & Crowley-Henry, 2013; Doherty, 2013; Doherty et al., 2013b; Haslberger & Vaiman, 2013). Besides the need to clarify persistent definitional issues, these authors call for more quantitative research to supplement the existing qualitative approaches. A further widening of studies to include more 'non-Western' perspectives and more comparisons between AE, SIE and immigrants' issues also seem in order. The authors request studies on all levels of analysis from the individual via the organization to the societal level including careers, talent management and talent flows. The latter areas are the focal point of this paper.

3. Global talent management (GTM) and SIEs

Several of the topics mentioned above intersect with talent management issues. We know much less about SIEs than about expatriates despite the fact that SIEs are an important part of available global talent, particularly in the local host country labor force. It is clear that to manage this distinct group of employees more effectively, organizations must be able to revise their GTM strategies in order to accommodate needs of a growing SIE population.

We believe that an important new emphasis in GTM involves merging human resource management and knowledge management disciplinary perspectives into what Vance, Vaiman, Cosic, Abedi, and Sena (2014) refer to as "smart talent management." Within this conceptual hybrid, GTM can be considered as the effective management of all human talent throughout the global enterprise, which in a very real sense embodies an organization's knowledge capital. Moreover, GTM policies and practices have a direct impact on the organization's capacity to generate, acquire, store, transfer, and apply knowledge and information in support of company goals and objectives. With this merged disciplinary perspective in mind, the following discussion will touch upon each set of GTM activities listed earlier and examine their applicability to SIEs.

3.1. Identifying, recruiting, and selecting talent from the external labor market

Due to a variety of external factors, like the shortage of skilled talent and increased competition for talent worldwide, many multinational organizations are forced to formulate and implement creative and aggressive strategies to attract and recruit top talent (Tarique & Schuler, 2012). Among such strategies may be the targeting of specific personality and competency-related profiles, recruiting of host-country nationals abroad (such as Chinese who were educated and are currently working abroad) to repatriate and work in their own country of origin, and attracting a diverse pool of applicants and providing them with full career support. Some corporations attempt to target SIEs, as they represent an important source of national and organizational talent (Inkson, Arthur, Pringle, & Barry, 1997). These organizations are specifically attracted by SIEs' higher levels of education, international experience, and faster adjustment to the host environment, among other sought-after qualities. In fact, where SIEs are found and recruited from within the local host country labor market, those with significant time living and working in the host country tend to possess an adjustment risk advantage over newly-arrived AEs in having largely surmounted the international adjustment challenge in the present host country, and being still interested in remaining.

Local company operations should maintain regular ties with various local networking organizations and resources for identifying and attracting SIE talent in the local labor market. There is evidence that SIEs are active in local networking activity for making connections leading to possible employment opportunities as well as to build and maintain a local support system (Vance, 2005; Vance & McNulty, 2014). Social networking resources such as special interest groups on LinkedIn and especially expatriate-focused sites organized by host country, such as InterNations.org, ExpatForum.com, and ExpatFocus.com, can be helpful in identifying local SIE talent for recruitment. Local organizations such as chambers of commerce (e.g., the American Chamber of Commerce or "AmCham," present in many countries) also provide networking opportunities for the local expatriate community and where SIEs frequently are found. In fact, SIEs recognize that these chamber organizations, through their networking events, provide valuable connections to local hiring organizations, and are therefore highly motivated to participate and even volunteer their services for those events.

There also are international women's organizations in most large cities (e.g., American Women's Club of Shanghai, International Women's Club of Budapest) that traditionally have catered to expatriate wives but increasingly to highly skilled women SIEs (many of whom are self-employed or local consultants) who actively participate to cultivate their local personal and professional support network. These organizations have been found to be very helpful for SIE women who, according to some evidence, may be more likely than their male counterparts to become SIEs and avoid the uncertainty, lack of control, and even gender-based discrimination involved when relying upon a more traditional AE career path (Andresen, Biemann, & Pattie, 2012c; Vance & McNulty, 2014).

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In general, organizations realize that it is not that easy to entice highly educated SIEs with solid international experience, since these SIEs understand their market value and recognize the high degree of their international employability. Companies, therefore, should develop more elaborate strategies to identify these highly valuable SIEs and work harder on their organizational branding to increase their value proposition and become a true talent magnet (Doherty & Dickmann, 2013). For example, proactive engagement with SIE-potential candidates, setting clear organizational expectations, as well as mentoring systems may prove useful in attracting talented SIEs. Other important strategies aimed at enticing SIEs may include provision of family support, spousal support, taxation and banking assistance, and anything else that may ease SIE adjustment in a host environment (Doherty & Dickmann, 2013).

Paying attention to an SIE's personal life needs seems to be especially important. In a recent study, Mäkelä and Sutari (2013) argue that international work affects not only the working life of SIEs but also their entire life situation. Moreover, if SIEs have a family, moving and living abroad is at least as challenging for their spouses and children as it is for them. The findings of the study show that working in an international environment challenges both SIEs and their families, and is usually causing issues in other spheres of their personal lives. Conflicts flowed from working life to personal life more often than in the opposite direction, the results demonstrate. Moreover, the findings show that SIEs' work and personal lives frequently influence and enrich each other positively. The increasing competition for talent requires companies to take account of work-life interface (WLI) issues in every area, not only when hiring SIEs. This WLI attention would promote their professional employees' long-term occupational well-being and also help organizations to ensure the continued commitment of their talented SIEs.

3.2. Developing employees

Even though SIEs have been known to go for less formal developmental opportunities, employing organizations should still try to identify SIEs' key knowledge, skills, and abilities (KSAs) in order to match them with the needs of the organization, and channel SIEs' talent into an appropriate direction that would optimally benefit the organization (Doherty & Dickmann, 2013). To accomplish that, it is important to align an individual's KSAs with his/her placement in the organization to avoid frustrating outcomes of underemployment. In addition, organizations must ensure that there are clear career growth opportunities available for SIEs within the firm, as well as possibilities for learning, autonomous and challenging work, and promotion. Other developmental strategies employed by the organization and used to benefit both domestic employees and AEs will equally apply to SIEs.

A particular advantage of SIEs over other local hires is typically their greater global competence and sophistication due to their mastering challenges of living and working in multiple cultural environments. In this respect experienced SIEs are much more like other AEs in their local subsidiary than the host country nationals (HCNs). However, due to their lack of long-term experience with the organization, SIEs tend to lack personal identification with their organization and alignment with company priorities and values. This lack of identification and alignment may serve as an obstacle to optimal commitment and loyalty to the organization, leading to sub-optimal performance and possible SIE talent turnover (Gagnon, Jansen, & Michael, 2008).

Therefore, to build SIE personal identification and alignment with the organization leading to enhanced long-term commitment, regular efforts should be made to understand and satisfy SIE personal needs, and to demonstrate how SIE needs are well served by meeting the needs of the organization. New SIE employee orientation and ongoing learning opportunities also should examine company cultural values and priorities, focusing on particular policies and practices at the local subsidiary that correspond to those values and priorities. As with local HCN talent identified for potential future company leadership, SIEs also should be given opportunities to travel to other company operations and meetings as well as spend time at company headquarters to provide valuable professional interactions and informal networking opportunities with company colleagues that promote the development of a common company mind-set and professional identity (Dunnagan, Maragakis, Schneiderjohn, Turner, & Vance, 2013).

3.3. Managing talent flows, including facilitating the movement of talented individuals across regions or countries

To better understand how organizations should manage the flow of talented SIEs, it is important to look at some key differences between AEs and SIEs, including "distinct motivational drivers, diverse educational backgrounds, age and some other individual factors" (Doherty & Dickmann, 2013, p. 238). Among the most salient drivers that distinguish motivation behind AEs' and SIEs' decisions to take on international assignments is the location of expatriation, career considerations, as well as the status of the host country. SIEs, for example, are much more driven by the status of the host country, especially in terms of family considerations, career prospects, and perceived ability to adjust in that new environment (Doherty & Dickmann, 2013).

SIEs tend to have a somewhat richer educational background than their AE counterparts, thereby representing significant human capital for an organization. Some recent studies, however, indicate that SIEs in general have less challenging work and hold lower-ranking positions than AEs — a situation that may easily lead to perceived underemployment, then to frustration, and ultimately to turnover. To avoid this downward spiral, organizations must ensure that there is no real (or perceived) SIE underemployment by matching their talents to organizational needs and providing necessary support to make their work more meaningful and challenging.

Age seems to be another factor that illustrates differences between SIEs and AEs, specifically in their career orientation. Younger SIEs prefer to have flexible, highly mobile careers, as opposed to AEs who display a more organizational career orientation. Other individual factors, like individual ability to deal with challenges of an international assignment and extensive experience living abroad, make SIEs a more attractive option for both local and international organizations. There are, however, some challenges related to managing SIE talent flow. According to Doherty et al. (2013a, 2013b)), these challenges are caused by five important factors: (a) a wide variety of cultural backgrounds, levels of education, and KSAs that SIEs possess; (b) SIEs typically are first attracted by a specific location (and its amenities, family friendliness, cultural tolerance, etc.), rather than by a specific organization; (c) in order to entice

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talented SIEs, organizations should overcome some complications related to integration, cultural adjustment, and resource allocation; (d) both domestic employees and AEs may have certain difficulties identifying and getting to know their SIEs (possibly contributing to maladjustment problems); and (e) knowledge, and especially its tacit component, may be lost to the organization, given the SIEs' propensity to be highly mobile.

The previously discussed development of SIE company identity and alignment through travel to other company operations and meetings as well as brief visits to company headquarters, where there is a free exchange of information and experience, also can serve to promote multidirectional talent flow leading to organizational learning and effective knowledge transfer. Besides contributions to building general international capability and organizational development for the multinational organization, these activities promoting internal professional network building also can facilitate future career transfer assignments for SIEs to other international locations, which may be particularly attractive to younger SIEs who value the additional international work and developmental experience.

3.4. Ensuring retention of talented employees

Retaining SIEs may be a challenging undertaking, given their motivational drivers to move abroad and seek employment in an organization. For instance, their specific work attitudes and self-managing career considerations, as well as a clear tendency to be on the move, could prove to be problematic to employing organizations (Doherty & Dickmann, 2013). In addition, organizations should keep in mind that SIEs are more concerned with their personal development, as opposed to organizational development, which may result in some conflicts that in turn can lead to turnover. Therefore, to keep their best SIE talent in the organization, management should come up with mutually beneficial talent and career development strategies. To ensure long-term retention, it is essential for the SIE to perceive his or her future career interests as being satisfied through ongoing membership in and contribution to the organization.

Moreover, there is a clear need on the part of the employing organization for greater consideration of the adjustment challenges that many SIEs are likely to face (McDonnell & Scullion, 2013). Scholarship on self-initiated expatriates is limited, and particularly with respect to adjustment issues. McDonnell and Scullion (2013) contend that self-initiated expatriates may face adjustment challenges greater than those experienced by traditional AEs because they move not only to new countries but also to new organizations. Due to SIEs' absence of pre-existing company ties and lower degree of emotional support provided by headquarters compared with AEs, they have a need to integrate more with local HCNs for social support. Besides less emotional support provided by company headquarters, SIEs also receive less financial support than do AEs, especially visible with special AE incentives and allowances, all of which contributing to lower job satisfaction among SIEs (Froese & Peltokorpi, 2011; Lo, Wong, & Yam, 2012). As the traditional expatriation literature demonstrates, SIE failure to successfully adjust and cope with these conditions is likely to generate negative individual and organizational outcomes, including turnover. Consequently, there is a significant need for specific consideration of the distinctive adjustment challenges that SIEs face.

To help newly-hired SIEs cope with these unique adjustment challenges, organizations should be solicitous to their concerns and needs. Initially, where emotional support is obtained largely from local host country employees and the surrounding environment, extensive language and cross-cultural awareness training, as well as information on local social support services and resources, may be especially helpful for SIEs that are relatively new to the host country. In addition, to promote positive SIE–HCN interactions underlying effective emotional support and to provide ongoing development and adjustment support for the SIE, a special assignment and appropriate training could be beneficially provided to certain higher-level HCNs who are in a position to give direction and key assistance as needed (Vance, Vaiman, & Andersen, 2009).

To help SIEs cope with perceived reward system inequities compared with AEs, organizations can develop unique reward packages that support SIE retention by recognizing the unique strengths and backgrounds that SIEs bring to the organization, and which distinguish them from other HCN local hires. For example, to recognize SIEs' valued broader international perspective and experience beyond that of local HCNs, a growing "local-plus" compensation trend in hot employment markets such as Hong Kong and Singapore involves hiring SIEs according to local salary structures, yet also sweetening the attractiveness of the compensation package for these talented and highly mobile professionals. Besides the local salary rate, these SIEs may be provided additional extra AE-type benefits, such as some form of housing assistance and possibly a partial children's education allowance, determined on a case-by-case basis according to SIE perceived value (HRMagazine., 2010).

4. Conclusion

The main contribution of our paper is to twin for the first time ideas about global talent management with the emerging international employee category of SIEs. Neither companies nor academics have yet given due consideration to SIEs, although they represent a significant part of the international talent pool. This is a missed opportunity. Internationally-operating organizations and SIEs share common interests, which proactive corporate management of this source of scarce talent could help foster. Such management would serve both organization and SIE, helping the former more effectively manage shortages in human capital and the latter to further their careers. Our discussion provides guidance to practitioners on how to include SIEs throughout four functional areas or general activities of talent management. It also suggests future research possibilities to academics, pointing to fields worthy of exploration.

There are some limitations to our paper: the two fields of global talent management and talent management are both relatively new and still developing. Therefore, much is in flux within each field, adding uncertainty to our discussion and suggestions. The yet

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nascent conceptual foundations of both fields also increase these uncertainties. Still, it is important for the further development and integration of both fields to put a first stake in the ground and start investigating the management of SIE talent.

The predominant picture of SIEs in past research has been one of independent self-serving agents in charge of their international careers, with little emphasis on how SIEs and organizations can purposefully work together to realize their respective goals. More research is needed to explore how this collaboration can effectively take place within the various functional activities of GTM. In addition, as mentioned in our discussion of SIE development, alignment, and movement across national boundaries, research should examine how SIEs initially identified and hired within host country labor markets can eventually become AEs in future international assignments for the company, thus becoming longer-lasting sources of talent for multinational organizations. With this initial contribution on SIEs within the GTM agenda, we call for further conceptual development as well as empirical qualitative and quantitative research to increase our understanding of SIEs as an important and unique source of talent for organizations competing in the global economy.

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