

# Types and Challenges of Expatriation

**Carla Freitas Morence**

*University of Aveiro, Portugal*


**Marta Ferreira Esteves**

*University of Aveiro, Portugal*

**Núria Rodrigues Silva**

*University of Aveiro, Portugal*

**António Carrizo Moreira**

 <https://orcid.org/0000-0002-6613-8796>

*University of Aveiro, Portugal*

## INTRODUCTION

Based on the Latin etymological root (*expatria*, outside of the mother land), expatriation comprises all individuals residing temporarily or permanently in a country other than the one in which they were born (González & Oliveira, 2011). However, the management literature clearly differentiates terms as expatriate and immigrant, in which the former is associated with individual sent abroad by the firms they work for, and the latter with individuals that left their countries, normally for socio-economic conditions (González & Oliveira, 2011).

The thriving economic globalization process has led to a clear increase in the number of migrants, expatriates and mobile employees, which has led the academic community to focusing on the expatriation phenomenon, especially in the process of adaptation of those expatriates to the countries of destination (Black & Mendenhall, 1991; González & Oliveira, 2011; Shaffer, Harrison, & Gilley, 1999; Wang, 2002).

Expatriation has been studied based on the interest of many multinationals in sending their managers/executives abroad, since qualified and skilled expatriates are major intangible assets to their companies when it comes to compete in the global market. (Black & Mendenhall, 1991; Shaffer, Harrison, & Gilley, 1999; Wang, 2002; Bonache, Brewster, Suutari, & Cerdin, 2018; Tahir, 2018). However, expatriation has also been studied from the point of view of small and medium-sized enterprises, although with less intensity (Ribau, Moreira, & Raposo, 2018). From the managerial point of view, the expatriate lives temporarily in a foreign country. Expatriation is the act of transferring an executive, eventually his/her family and children, to another subsidiary of the company, located in a different country and culture (Bonache et al., 2018).

When internationalizing a company, expatriation works as a way to solve the problems of lack of professionals with technical and managerial skills. Expatriates are also of added value to the company in the implementation of new projects.

When one experiences times of crisis, the tendency is to seek a better life in another country, yet expatriates tend to do it in ways different from what the ordinary migrants do. They are more adventurous, fearless, and willing to take more risks, bearing in mind that expatriation is seen initially as a temporary experience, something enriching and less like a necessity. Expatriates' performance is a multidimensional

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construction that encompasses the dimensions of cross-cultural adaptation and requires success of the international mandate, i.e. achieving the goals proposed, managing local employees, leading the foreign affiliate, scanning the economic environment and appropriately dealing with important international counterparts.

With the globalization process, expatriation has been growing and tends to be seen as an important step in the development of an international professional career. As a worldwide phenomenon, expatriation is guided by a constantly dynamic working relationship between employer and employee (Jokinen, Brewster, & Suutari, 2008).

Although there is extant research on expatriates, it addresses career-based and business-based expatriation as “*business expatriates, defined as, legally working individuals who reside temporarily in a country of which they are not a citizen in order to accomplish a career-related goal, being relocated abroad either by an organization, by self-initiation or directly employed within the host-country*” (Selmer et al., 2018, p. 136).

The expatriation process ends with repatriation and means that the international assignee returns to his/her home country with family members with whom he/she had expatriated in first place. Regarding this final phase of expatriation, that can be alone a very complicated process, there are already many studies trying not only to understand its complexity but also seeking improved strategies to solve difficulties that the repatriates may face (Chiang, Van Esch, Birtch, & Shaffer, 2018).

In this chapter expatriation is scrutinized in depth in its several dimensions, due to the complexity of the concept and bearing in mind the singularity of the different terms and concepts. This chapter also addresses the impact they might have in the economy and other variables such as gender, social class, or country of origin. This chapter focuses on differentiating five major realities: migration; assigned expatriates (AEs); self-initiated expatriates (SIEs); lifestyle expatriates; and expatpreneurs. The former focuses on survival, whereas the latter are more related to personal realization. Clearly, the expatpreneurs concept combines expatriation with entrepreneurship.

This chapter is divided in six different sections. After this introduction, that comprises the first section, the research method is laid down in the second section. The literature review is presented in section three and covers several types of expatriation. The discussion and conclusions are addressed in section four. Finally, section five presents the future research direction.

## RESEARCH METHOD

In order to prepare this chapter a research was carried out in the SCOPUS database. Eight articles were analyzed taking into account differences in approaches of the expatriates. The objective was not to analyze in depth the articles, nor the variables / constructs that compose them, but to explore the most important different perspectives embracing the terms covering expatriation. As such, as referred to in the introduction section it was decided to embrace the analysis of five peculiar but complementary approaches: migration; assigned expatriates (AEs); self-initiated expatriates (SIEs); lifestyle expatriates; and expatpreneurs.

Expats profiles are presented and explained according to the reasons of their expatriation and behaviors taken abroad. The main reasons that motivate leaving the country of origin determine the enrolment in the new country with positive interaction and sharing of common interests, stimulating cooperation and good performance, as well as diminishing situations of bias and stress. The inverse also happens.

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