Guest editorial

The dark side of expatriation: dysfunctional relationships, expatriate crises, predjudice and a VUCA world

Introduction

International assignments and other forms of global employment continue to increase in numbers and complexities (Brookfield Global Relocation Services, 2017; Dickmann, 2018). The high practical relevance of this topic is reflected in the extensive research and tremendous wealth of knowledge about global mobility that has accumulated over the past few decades (e.g. Bader *et al.*, 2017; McNulty and De Cieri, 2011; Shaffer *et al.*, 2012; Shaffer *et al.*, 2016). Highlighting the importance of research in this field, the *Journal of Global Mobility*, a peer-reviewed journal exclusively dealing with topics around international assignments and global mobility, was inaugurated in 2013.

Looking at the history of research on globally mobile employees, it is evident that a majority of studies has focused on the positive or bright side of working and living abroad. Scholars have mainly looked at well-paid, well-protected, assigned organizational expatriates and have concentrated on understanding what makes an assignment successful, including the role of expatriates' partner and family, selection, training, mentoring or perceived organizational support (e.g. Anderson, 2005; Caligiuri, 2000; Lazarova *et al.*, 2010; Ren *et al.*, 2015; Schuster *et al.*, 2017; Shaffer *et al.*, 2011, 2016). Moreover, researchers have considered how organization, job and community embeddedness affect expatriate outcomes such as retention (Peltokorpi *et al.*, 2015). Other research has looked at expatriates' role in transferring knowledge and spanning boundaries between host country and headquarters (Burmeister and Deller, 2016) and addressed reverse expatriation (inpatriation) (Harvey *et al.*, 2000; Reiche, 2011; Schuster *et al.*, 2019), in which foreign employees are delegated from foreign subsidiaries to the headquarters of MNCs (Collings *et al.*, 2009). Consequently, such a positive focus on expatriation has also been adopted to examine successful repatriation from various perspectives (Breitenmoser and Bader, 2016; Breitenmoser *et al.*, 2018; Knocke and Schuster, 2015; Kraimer *et al.*, 2012; Lazarova and Cerdin, 2007). All in all, these research efforts have contributed significantly to both theory and practice while firmly establishing global mobility as an important field of research.

In contrast with the dominant positive focus, a few global mobility researchers have sought to explicate the "dark side" of expatriation. For instance, early scholars assessed the challenges and difficulties that come along with adjusting to a new environment (Black, 1988; Black and Gregersen, 1991; Black *et al.*, 1991) with the majority of subsequent research on adjustment applying a stress perspective (Takeuchi, 2010). Other scholars have gazed into darkness by looking at the risks of expatriation in hostile environments (Bader, Reade and Froese, 2019; Bader and Berg, 2014; Bader and Manke, 2018; Bader and Schuster, 2015; McPhail and McNulty, 2015), discrimination and hostility (Bader *et al.*, 2018; Hutchings *et al.*, 2013), and expatriate divorce (McNulty, 2015). Yet another stream of research has explored drivers of assignments failure. Among the many factors associated with "failed" assignments (for an overview, see Harzing, 1995), scholars have identified personal crises like burnout (Bhanugopan and Fish, 2008), insufficient work environments, high workloads and poor work-life balance (Bader *et al.*, 2018), as well as extreme occupations (e.g. oil and gas, security and terrorism, international aid) where work life strongly impacts one's private life. Furthermore, researchers have recognized that exptriates face unexpected challenges upon repatriation such as career derailment or

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reverse culture shocks (Breitenmoser and Bader, 2019; Ho *et al.*, 2016) that cause trouble in the aftermath of an international assignment.

Researchers have also begun to expand the scope of global mobility beyond expatriation to include other forms of global mobility. For instance, every year, thousands of migrants relocate to other countries to take on low paid service and hospitality work, agricultural and horticultural labor, construction jobs or domestic work – often under questionable conditions. Buckley (2012) highlighted the tragic experiences of Indian migrant construction workers in Dubai, and the economic insecurity they faced when they lost their jobs after the collapse of the emirate's construction sector. Other research points at people being forced into unemployment or being employed in jobs below their qualifications, such as a Syrian Medical Doctor working as a nurse or taxi driver (Ariss *et al.*, 2013).

The expatriate literature is rife with many very interesting approaches, and we believe that more explorations of the dark side of expatriation will advance our understanding and help us to develop a more holistic perspective of global mobility. Therefore, with this Special Issue, our intent was to give this research a platform and solicit research dealing with the dark side of being a globally mobile employee. Aware that this topic is still rather nascent, we are pleased to report that among the submissions reviewed, we identified two conceptual and one empirical articles could be included in this Special Issue. All have undergone an intensive process of revisions where the authors showed great dedication and effort, and we believe that these three very intriguing and thought-provoking pieces provide a strong foundation for future work in this area.

Articles in this special issue

The first article in this Special Issue, entitled "A model of the dark side of expatriate-host country national relationships," is authored by Ljubica, Shaffer, Tin and McKouen. In their qualitative study based on 27 semi-structured interviews with both expatriates and host country nationals (HCNs), they develop a nomological model of the dark side of the relationship between expatriates and HCNs. Focusing on disruptive relationship behaviors expatriates and HCNs exhibit toward each other, the authors investigate antecedents of such behaviors and mechanisms through which these behaviors affect the relationship between expatriates and HCNs. The authors find that relational dysfunction emanates from multilevel differences and ambiguities between expatriates and HCNs because these are likely to increase emotional, social, instrumental and opportunity costs. In fact, based on these differences and misunderstandings, expatriates and HCNs socially categorize each other negatively and detach themselves from the relationship. This, in turn, leads to disruptive relational behaviors amplifying conflicts and detachment dynamics, worsening interpersonal and intergroup dynamics. In the end, this results in relational breakdowns. With this approach, Ljubica *et al.* are the first to analyze the nomological network of negative relationship dynamics and ambiguities between expatriates and HCNs, and therefore deliver novel insights on how such dynamics evolve. As relationships with HCNs are a key component of international assignments, addressing the risk of downward spirals deepens our understanding of an important issue of the dark side of expatriation.

In the second article, "Highway to hell? Fit-dependent expatriate crisis events and how to deal with them," McNulty, Lauring, Jonasson and Selmer develop a conceptual model for expatriate crises. While expatriation is often related to positive outcomes such as adjustment, knowledge gain or personal development, this paper highlights the dark side of expatriation in a very explicit manner. In particular, it focuses on the occurrence of fit-dependent crises, i.e. when the crisis is triggered by maladjustment or acculturation stress in the new country. Drawing from literature on crises and expatriation, the authors' theoretical model depicts the complexity of experiences and identifies four potential domains of expatriate crises, i.e. the personal, family, organizational and host national

domains. They also discuss how actors in the organization and the larger social network can directly or indirectly influence the expatriate, for instance through the involvement of external specialists like embassies, lawyers, or medical professionals. By discussing those four domains in which expatriate crises can originate and outlining how different actors can assist the expatriate at different stages of crisis, they provide a solid theoretical and practical contribution to literature on global mobility by highlighting the importance of examining the dark side of the phenomenon.

Finally, in their article "Congruence of economic mobility beliefs and immigrants' self-esteem," Guerrero and Turchick Hakak conceptualize the impact of economic mobility beliefs among immigrants and HCNs. Applying the terror management theory, they develop a relational model that addresses how economic mobility beliefs of immigrants and HCNs interact with other factors and how these different combinations of beliefs affect immigrants' self-esteem. One core implication of the study is that the uncertainty and vulnerability associated with living in hostile environments makes immigrants' mortality more salient. A lack of confirmation of immigrants' economic mobility beliefs from HCNs can lead to a decrease in immigrants' self-esteem, and this, in turn, manifests itself in negative work outcomes. With regard to the growing number of immigrants, focusing on perceptions of immigrants by HCNs and their impact on immigrants' self-esteem is of increasing importance. By focusing on this important aspect of the dark side of global mobility, Guerrero and Turchick Hakak address a timely topic that is relevant for both academics as well as practitioners.

Future avenues: VUCA in the field of global mobility

These articles demonstrate in a profound and illustrative way the importance of further consideration of the dark side of global mobility. Therefore, the articles in this Special Issue are a valuable starting point and pave the way for further research. Adding to this, we want to outline that there are plenty of novel research areas and questions that need to be answered in order to better understand the dark side. These areas might include questions on ethics in expatriate leadership, discriminatory behavior abroad and unmet expectations. For instance, what do we know about negative leadership experiences in the global mobility context? Do globally mobile employees engage in abusive leadership or discriminatory behavior toward HCNs? In other words, do leadership values and ethics change when abroad, in particular when globally mobile employees are facing an environment in which ethical norms differ from their home country? How do expatriates respond to the tensions that arise when cultural values clash? Do they succumb to corrupt practices or turn a blind eye when their HCN colleagues engage in such behaviors? Furthermore, if such behavior occurs, what can organizations do to protect individuals from such experiences? On the other hand, we need to ask if and how foreign work practices might contradict globally mobile employees' values and how they react to discriminatory work practices affecting themselves or others working with them? We also need more research looking at what kind of work practices foster frustration among expatriates and how expatriates cope with that. Finally, there is also a dark side of repatriation. Expatriates may feel "betrayed" after their return because they feel that their psychological contract has been violated if their career does not progress as expected. We need to shed light on what unsuccessful repatriation means for expatriates' future careers and how companies can attract staff for less attractive international assignments without making promises for their future career that cannot be kept.

Above and beyond challenges expatriates themselves face when relocating abroad, there are also novel challenges for the global mobility function as well as for other types of globally mobile workers. While business leaders and HR mangers are not using the term "dark side," they acknowledge that global mobility is becoming increasingly complex and

challenges have changed and intensified over the years. For instance, recent changes in the political environment of many countries or the magnitude of changes in the technological environment have strong implications for global mobility as they increase ambiguities and complexities, both for expatriates as well as global mobility departments. Also, increased immigration around the world has resulted in challenges for organizations. Although immigrant employees are often a vital source of creativity and innovation, they often face difficulties adapting to a new and culturally different work environment. Among some of the conundrums they face are ostracism, antagonism and identity conflicts (Harrison *et al.*, 2018). What can organizations do to foster an environment that recognizes the value of diversity and that facilitates the successful integration of immigrants into the workplace?

Looking at the dark side and challenges of these changes, expatriate research and practicioners have started summarizing them under the term VUCA. The acronym VUCA refers to the volatility, uncertainty, complexity and ambiguity of a company's internal and external environment. While originally introduced in the military context at the end of the Cold War, the concept has been increasingly introduced to the business context with a broad applicability. For instance, Dickmann (2016, p. 83) outlines that VUCA is the "reality in which we as International HR operate." While VUCA does not explicitly address global mobility, it is a helpful categorization to analyze how the company's environment affects global mobility in the future.

Adopting a VUCA perspective, we derived a framework (see Table I) that clusters what we consider to be some of the most important challenges and research needs with regard to the dark side of global mobility. Drawing on the drivers of the VUCA environment, we outline the effects the respective drivers have on global mobility and what this means for worthwhile avenues of further research on the dark side of global mobility.

Volatility
Volatility refers to the nature, magnitude and speed of change that occurs within a company's internal and external environments. With regard to global mobility, we can see that global mobility professionals are increasingly confronted with unexpected or unstable situations of unknown duration. Volatile situations are not necessarily hard to understand and often global mobility departments have accumulated knowledge and expertise on how to deal with those situations. However, despite, for instance, having developed standardized policies (Bennett and Lemoine, 2014), volatile environments can still be challenging. The nature of change occurs in the political environment (political instability, terrorism, (de) globalization), the economic environment (financial crises, global shifts in power, emergence

		Drivers	Areas for global mobility research
V	Volatile	Change nature	Flexibility vs compliance
		Change magnitude	Agility vs stability
		Change rate and speed	Idiosyncratic deals vs standardized policies
U	Uncertain	Unpredictability	Intelligence management
		Potential surprises	Advanced risk analysis
		Unknown outcomes	Scenario planning
C	Complex	Task correlation	Centralized vs decentralized HR
		Multifaceted effects	Stakeholder management
		Influencers	Knowledge transfer
A	Ambiguous	Lack of clarity	Expectation management
		Ideal vs actual	Psychological contracts
		Misinterpretation	Formalization of processes

Table I.
Areas of global mobility research in a VUCA world

of new and decline of established markets), the social environment (demographic changes, ageing society), the technological environment (digital transformation, big data, artificial intelligence, robotization), legal environment (immigration law, discrimination law, health and safety law) and the ecological environment (climate change) with increasing magnitude and speed. An emerging stream of research has addressed this by looking, for instance, at people management in hostile environments and how companies deal with it (e.g. Bader, 2015; Bader and Berg, 2013, 2014; Bader *et al.*, 2015, Bader, Schuster and Dickmann 2019; Lee and Reade, 2015; Oetzel and Getz, 2011; Reade, 2009).

A recent example of volatile environments in the global mobility function is the unstable political situation in Venezuela, which caused global mobility professionals in various companies – especially in the oil and gas industry – to become active and initiate measures to deal with the new realities. Patrick Pouyanne, CEO of the French oil and gas firm Total, told the press[1] that it became necessary "to evacuate all of our personnel from Venezuela given what has happened" and that the company is no longer able to manage Venezuela from the USA but from Europe. This has severe consequences for the global mobility departments of the affected companies as they not only have to manage the evacuation process, but they must also establish a new team of global experts to take over the business activities in Venezuela from a European location. KPMG (2018) outlined an increasing relevance of non-traditional assignments, including commuter assignments, extended business trips, short-term assignments and project-specific assignments which can be seen as a strong indicator for an increasingly volatile environment of the global mobility function.

The overarching message here is that companies in general and global mobility departments in particular are increasingly demanded to become agile and move away from their process- and compliance-oriented global mobility practices. Dickmann (2018), for instance, outlines that global mobility leaders need to develop agility to align and support a company's business and HR strategies, to create value and to be able to quickly adapt to changing organizational needs. As a result, he points to the necessity that global mobility professionals need to fill the role of strategic advisors rather than considering themselves as an operational service unit. From a higher level perspective, this means that global mobility departments have to create flexible policies and governance approaches with sufficient room to manage exceptions. Idiosyncratic deals, for instance, which are defined as personalized work arrangements of a nonstandard nature negotiated between employees and their employers (Rousseau, 2001), enable global mobility departments to react flexibly in volatile environments by providing expatriates with incentives that better fit their individual expectations and needs. Of course such idiosyncratic deals create challenges as well, as they might erode trust and motivation of other employees. Therefore, it is critical for global mobility professionals to find the right balance between providing customized incentives and promoting fairness among the workforce. Consequently, we believe that questions in three areas of research need to be addressed in the near future. These are flexibility vs compliance, agility vs stability and idiosyncratic deals vs standardized policies.

Uncertainty
Uncertainty refers to the extent to which one can confidently predict the future. In other words, even though the basic cause and effect of a situation is known, there is a lack of information about the outcome and also change mechanisms are unknown and often unpredictable. Hence, the drivers behind uncertainty are a high degree of unpredictability, along with unknown outcomes and potential surprises. A good example for an uncertain environment is the decision of the UK to leave the European Union (Brexit). Although the outcome of the referendum itself can, at least partially, be considered a surprise, the entire

process after this vote did not necessarily lead to an increase in predictability. Even one week before the actual date (March 29, 2019) to leave the European Union, there was still no clarity about the outcomes.

The on-going uncertainty puts pressure on MNCs and global mobility professionals alike. There is a wide range of issues that global mobility professionals must consider. From managing the relocation process of entire units when the top management team decides to leave the UK, via re-thinking the instrument of extended business travelers in the case of new visa requirements, to workforce planning for UK subsidiaries – global mobility needs to deal with it. The unknown outcomes of the Brexit require global mobility departments to plan for multiple future scenarios instead of formulating HR strategies based on a single prediction. A variety of other examples illustrate the pervasiveness of uncertainty. For instance, terrorist incidents are non-predictable with regard to when and where there they occur; the only thing that seems certain is that there will be further attacks. Hence, global mobility professionals have a strong need for intelligence management and advanced risk analysis. In fact, the security situation around the globe is constantly changing and varies strongly from country to country, region to region and location to location. Professional service providers, such as the exop-group (www.exop-group.com), supply global mobility departments with digital solutions in order to efficiently monitor the occurrence of critical events, assess global country and city risk, and support the management of crisis. This all can lead to detailed scenario planning and eventually help companies to reduce uncertainty.

Complexity

Complexity refers to the number of factors that one needs to take into account, their variety and the relationships among them. Often, tasks are correlated and effects multifaceted. In addition, there are influencers that additionally increase complexity, such as external stakeholders. Managing a global network of subsidiaries and the respective staff was never a simple task. However, the level of complexity has increased due to more and faster availability of data and different regulations in more and more countries. For instance, Dickmann (2016) argues that it "takes much effort and in-depth understanding to work with the large range of compliance issues that GM departments face." This raises the question of whether HR and respective policies should be centralized vs decentralized. Especially paired with the demographic changes, resulting in large increases in diversity and new societal values and ethics, this seems to increase complexity even further.

Another area that has contributed tremendously to increased complexity is social media. Before social media, the activities of companies abroad seemed to be more isolated. Only huge scandals made it into the news in the home country and thus created awareness among a broader public. However, in times of Twitter and Instagram, within minutes, a topic can get viral and is available all over the world. Consequently, employees are increasingly under potential scrutiny of the wider public, including expatriates. A sound example is the case of a German top executive, in charge of a German logistics company's subsidiary in Singapore, who got jailed for slapping a taxi driver[2] who refused to pick him up due to being drunk. Though embarrassing, this is a minor incident that probably would have been swept under the carpet in times before social media. However, this was in 2016 and caused quite some attention and the image of the German company was tarnished. The resulting damage control is part of an extended stakeholder management plan, which accounts for stakeholders that only emerged due to the increased complexity.

Finally, knowledge transfer between subsidiaries has increased in importance and complexity as well. Harzing *et al.* (2016) disaggregate the role of knowledge transfer across management functions, directions of knowledge transfer and type of international assignees. Building on their pioneering work in this direction, research needs to account

for the complexity and shed light on knowledge flows looking at both the bright and the dark side. In particular, it would be useful to consider the role of both expatriates and HCNs in the knowledge transfer process. Cross-cultural dyads are complex and often fraught with attitudes and behaviors, such as distrust and conflict, which inhibit the transfer of knowledge (van Wijk *et al.*, 2008). What skills or personal qualities can expatriates and HCNs draw on to increase the likelihood of developing positive cross-cultural relationships, and what can organizations do to facilitate positive work relationships?

Ambiguity

Ambiguity is manifested in a lack of clarity and the difficulty of understanding exactly what the situation is. This means that causal relationships are not completely clear and global mobility professionals cannot rely on past experiences. In fact, there is a clash between ideal and actual outcomes and a lot of room for misinterpretation. Technological disruptions, increased global competition, and again demographic change and new work values are some of the most important contributors to increased ambiguity. With regard to global careers, emphasized by the increased importance of protean careers (Breitenmoser *et al.*, 2018), MNCs need to engage much more in expectation management. Dickmann highlights that there is a broad variety of different assignment types, from business drivers to personal development assignments. However, it is not always clear to the expatriate what the main purpose of his or her assignment is. Therefore, in order to reduce ambiguity, it is essential to mutually manage expectations in order to avoid disappointment at the end of the assignment, for instance, when an expatriate was expecting to get a promotion but then finds out that this is not the case and never was planned. This is very much related to formalizing processes, which is helpful to create transparency and reduce the level of ambiguity.

Another way to handle ambiguity can be achieved by doing research on psychological contracts in the field of global mobility. Psychological contracts are defined as the beliefs of an individual about the conditions of the exchange relationship with their employer (Rousseau, 1989). In other words, they are the implicit, unwritten component connected with the assignment. Not knowing about the respective parts of the contract the employee has in mind bears great potential for ambiguous understanding and, consequently, misinterpretation which in consequence can cause an expatriate to perceive a violation or breach of the psychological contract. Such perceived breach then again may trigger a variety of negative outcomes, like negative affect or attitudes (Rousseau *et al.*, 2018). Consequently, it is critical for GM managers to create clarity, avoid misinterpretation and be as unambiguous as possible.

Conclusion

With this Special Issue, we hope to inspire more work on the dark side of global mobility. The three articles included in this issue provide some novel insights into this phenomenon as well as a starting point for future research. In addition, we offer several suggestions for broadening the scope of research in this area. Taking into account that volatility, uncertainty, complexity and ambiguity make today's global mobility management a lot more challenging and complicated, it is more important than ever for employees and organizations to be prepared to successfully navigate the environments in which they operate.

Given the increasing practical importance of global mobility in multinational companies and the fact that the world seems to become more VUCA than ever before, we hope that our Special issue will inspire more research on the impact of these issues on individuals and organizations. Although the cornerstone has been laid, we are still at the beginning and of this important field of research and would like to see much more to come.

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Notes

1. www.france24.com/en/20190207-total-pulls-staff-out-venezuela-after-us-sanctions

2. http://theindependent.sg/ceo-of-german-mnc-gets-2-weeks-jail-for-causing-hurt-to-taxi-driver/

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