

# Recruiting business expatriates in Portugal: a surefooted endeavor?

Recruiting  
business  
expatriates

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## Abstract

**Purpose** – Managerial discourses tend to portray work-related mobility practices in a positive light, presenting mobility assignments as a place of stimulus and differentiation. A conception of mobility as an opportunity, may contrast, in specific economies and business settings, with lived personal experiences. This article reports the results of a three-year study, aimed to question how multinational companies (MNCs) located in a small and developing European economy (Portugal) are building talent pools for expatriate assignments. Interaction effects, as proposed by the job demands-resources (JD-R) theory, are considered as lens to understand the interplay of company expatriate policies, willingness profiles and psychological contracts of expatriates. By using a Portuguese sample, the study examines whether prior findings in mature economies and consolidated MNCs can be generalized to less developed international business settings.

**Design/methodology/approach** – A three-year study, encompassing 24 expatriate cases observed in five multinational firms born or located in Portugal. Two techniques of empirical data collection were used: statistical sources and documental analysis and in-depth interviews. A total of 37 interviews were conducted, both in-person and remotely, of which 13 were with company managers and representatives, and 24 with expatriates (as defined and referred like this by the companies under study).

**Findings** – Heterogeneous company policies, ranging from juvenile, functionalist to more dynamic and flow-based approaches, are presented as qualifying resources of willingness levels and psychological contracts of expatriates. Observed interaction effects between policies, willingness and psychological contracts, empirically mirrored in three profiles (conformist, protean and disrupted expatriates) suggest that incentive effects (emanating from company policies) and job demand-resource balance, factored as terms of social and economic trade, are non-linear and asymmetric, influencing firm propensity to succeed while using international work to support company expansion goals. As job resources, expatriate policies are presented as operating as pull or push factors: functionalist HR approaches seem to act as push factors generating more conformist or compelled willingness profiles.

**Research limitations/implications** – Generalization of study's outcomes has limitations. Future studies are encouraged to use comparative and longitudinal research designs. Furthermore, future research should include business expatriates with entry-level positions, and increase the number of interviewees, as results can also be considered as limited by sample size.

**Practical implications** – It is suggested that further strategic work is needed to present expatriation development value, formally screen and consider willingness level as selection criteria, and enlarge the pool (from internal to external) of candidates, in peripheral economic settings such as Portugal. A shift to more dynamic and job resource-dense policies are suggested as beneficial, as pathway to optimize social and economic value from expatriation assignments and work experiences.

**Originality/value** – By putting the interplay between macro and micro-level processes into perspective, the study provides empirical evidence on how company expatriate policies have come to promote unforeseen differentiation of employee willingness and psychological contracts at the heart of MNCs. This is particularly relevant in developing economies such as Portugal, challenging the need to build talent pools for international work assignments. Empirical data illustrating company policies interactive effects with different willingness profiles and psychological contracts of expatriates is provided.

**Keywords** Global work, Global mobility, Expatriation, Expatriate recruitment, Expatriate willingness, Employment relations, Psychological contracts, Job demands-resources (JD-R) theory

**Paper type** Research paper

Received 24 May 2020  
Revised 14 October 2021  
23 January 2022  
4 June 2022  
15 July 2022  
Accepted 20 July 2022



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## Introduction

This article examines expatriate willingness to accept international assignments and how individual willingness dependencies relate with company expatriate policies and psychological contracts, in multinational companies (MNCs) of a less frequently cited and developed country (Portugal).

Statistics are meager in describing the Portuguese forms of company-assigned worker international mobility, but recent studies (Pinto *et al.*, 2012; Farcas and Gonçalves, 2017) indicate a possible raising trend in the last decade, coupled with self-initiated migration movements (Pires *et al.*, 2020). Empirical evidence exists supporting that recent work-related mobility is being driven by poor labor market situation in Portugal, with pull factors (e.g. work-related international experience) also being identified as willingness drivers, both for company-led and self-initiated mobility (Farcas and Gonçalves, 2017; Pires *et al.*, 2020).

Recent studies suggest that Portugal's image as poster child for post-crisis emigration may be misplaced (Justino, 2016; Pires *et al.*, 2020), given the fact that, despite recent emigration flows of highly skilled young people, promoted in particular by MNCs policies, this didn't change the traditional profile of low-skilled Portuguese emigration and the weight social representations of mobility and positive expectations of accessing opportunities abroad have, in leveraging unemployment and wage differentials as mobility intent drivers. In Portugal, mobility-related representations and attitudes have a significant impact, varying by social group, with youth and the more educated more likely to say that the chance of working abroad is better, while older and less-educated people tend to be less optimistic about mobility as an opportunity (Justino, 2016; Pires *et al.*, 2020).

As employer organizations aim to expand and strengthen their presence overseas, their need for international work and assignees typically grows (Brookfield, 2016). Recent studies show that more than 90% of MNCs are currently using long-term assigned business expatriates (Finaccord, 2019; KPMG, 2020). In an increasingly diverse global mobility and international work scenario (McNulty and Brewster, 2019; Jooss *et al.*, 2020; Bonache *et al.*, 2021), scarce empirical evidence exists concerning the way and extent international work assignments are being deployed by Portuguese companies (Câmara, 2011; Pinto *et al.*, 2012; Martins and Diaconescu, 2014; Pinheiro *et al.*, 2015; Farcas and Gonçalves, 2017; Marques *et al.*, 2021) and framed by MNCs policies, namely through the use of business assigned expatriates, that can be 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 or by self-initiation, or directly employed within the host country" (McNulty and Selmer, 2017, p. 30).

Within an international work context, additional pressure can arise from factors such as geographic dispersion, exposure to different social references and frequent mobility, which may create different types of job characteristics and interactions with contextual resources (Rattrie and Kittler, 2014). For expatriate individuals, the role of company policies as qualifying resources is increasingly empirically acknowledged as means to reduce strain and prevent willingness and psychological contracts impairment (Kawai and Mohr, 2015; Biswas *et al.*, 2021). However, heterogenous MNCs practices tend to be observed, with an overall degradation of expatriate working conditions, reduced organizational initiatives that support employees, and an employer expectation of individuals taking more responsibility for their own well-being (Biswas *et al.*, 2021). As noted by Pinto *et al.* (2012, p. 2295), focusing research efforts on the individuals' viewpoint about company policies, the dialectics established between these policies and concrete expatriation experiences and perceptions of possible impact of these experiences in their existing psychological contract (Rousseau, 1990; Guzzo *et al.*, 1994; Yan *et al.*, 2002; Pate and Scullion, 2009; Perera *et al.*, 2017; O'Donohue *et al.*, 2018; Sherman and Morley, 2018) is critical, as "most of the literature seems to be based on the assumption that organizational interests to use international assignments are consistent with individuals' motives, but that unitarist assumption has been under increasing scrutiny".

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Despite the relevance of the topic, due to the increasingly international character of the work context in many organizations, it is worth considering that the mentioned interaction processes tend to be discussed as side theme in more generally focused studies (Rattrie and Kittler, 2014). The present study aims to address this gap, anchored in the hypothesis that company policies, in a business expatriation context, allow for conditional job resources (Biswas *et al.*, 2021) to be provided (or not), by purposefully allocating resources to maintain and improve expatriates' working conditions, therefore playing a qualifying role in maintaining or improving employee willingness and psychological contracts under contexts perceived as being of high job demand (Bakker *et al.*, 2007; Demerouti and Bakker, 2011). To address its goal, the study considers interaction effects, as proposed by the job demands-resources (JD-R) model (Bakker *et al.*, 2007; Demerouti and Bakker, 2011; Rattrie and Kittler, 2014; Bakker and Demerouti, 2017), as lens to understand how expatriation-related company policies are enacted as resource pathway to ensure expatriate willingness – understood as the likelihood of an individual accepting an expatriation job offer (Mol *et al.*, 2009) – as well as the impact of this in terms of the psychological contract maintained with employer organizations. With this approach, the possibility to add developments or amendments to the JD-R model that may foster its use in international work contexts, namely for less cited countries and economies, such as Portugal, with significant MNC segmentation and heterogeneity (Amador and Cabral, 2014; Forte and Moreira, 2018; Silva *et al.*, 2018; Cabral *et al.*, 2020), was considered as subsidiary research goal. The paper is organized in the following way: first, an overview of the existing literature of MNCs' expatriate policies and expatriate willingness and psychological contracts is made. Then, the methodological approach is described, and the study findings are presented. The paper ends with a discussion of the findings, along with implications, limitations and suggestions for future research.

## Theoretical framework

### *Multinational companies (MNCs) expatriate policies: contemporary trends*

The amount of research currently available about international work experiences has been raising increasing awareness of the crucial nature of the context in which international work is carried out and the nature of the international work experience (McNulty and Brewster, 2019). From the 1970s onward, there has been a stream of articles focused on international work arrangement and experiences, namely business expatriates and business-led expatriation, most of it focusing on developed Anglo-Saxon economies (Japan, Australia, Finland and Germany can be presented as exceptions) (Jooss *et al.*, 2020), drawing on MNCs located or headquartered here. Built into this research there has been a context-agnostic and unitary assumption, possibly becoming less viable as the operating and economic context changes. As illustrated by Bonache *et al.* (2018), expatriate motives and experiences are changing, and the deployment of more dynamic, flow-based and polycentric company practices and policies is being recommended.

The nature and type of expatriate profile and expatriation assignments is indeed widening, mirroring MNCs difficulties to implement and maintain successful policies: a lack of capability in this area is regularly identified as a key skills gap of HR and employment relations professionals (Collings *et al.*, 2018). To this regard, the literature remains diffuse and there is little evidence that firms do manage talent effectively on a global scale (Cascio and Boudreau, 2016).

Organizations traditionally use expatriates to transfer knowledge, for control and coordination, and management development (Edström and Galbraith, 1977; Harzing, 2001), with the aim of improving innovation and organizational performance (Bonache *et al.*, 2021). Due to these goals, assigned expatriates tend to occupy senior ranked positions or be highly paid subject matter experts in a core domain of knowledge. Currently, a broader plurality of reasons, scope and employment modes for expatriation, higher diversity of companies, destiny locations and nationalities, as well as increased complexity of generational, family

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and gender issues, has been highlighted by recent research (Bonache *et al.*, 2018; Finaccord, 2019; KPMG, 2020; Bonache *et al.*, 2021). Mid-status expatriates, middle manager or technical specialists are being increasingly involved in international assignments as part of business development strategies (McNulty and Brewster, 2019).

Typically, in Portugal, decisions to open to international markets have featured older and larger companies and have been restricted to certain business sectors, destination countries and host markets (Amador and Cabral, 2014; Banco de Portugal, 2015; Amador, 2017; Fernandes, 2017). As consequence, Portuguese MNCs have particularly heterogeneous experience drafting and maintaining corporate mobility policies and leveraging expatriate expectations (Câmara, 2011; Pinto *et al.*, 2012; Martins and Diaconescu, 2014; Farcas and Gonçalves, 2017). This may emerge in sharp contrast, raising managerial and employment relations implications, within a global competitive business landscape where, in an increasing sum of cases, dynamic HR policies (Helfat *et al.*, 2007; Linden and Teece, 2014; Collings *et al.*, 2018) and strategic global talent management specialization are observed (Cascio and Boudreau, 2016), and an expatriation assignment is not, in most cases, a first venture abroad (Bonache *et al.*, 2018). For example, between 40 and 70% of European assignees are reported to have earlier international assignment experience (Bonache *et al.*, 2018).

As opposed to functionalist approaches, where HR policies tend to be understood as a static and ordinary capability (Helfat *et al.*, 2007; Linden and Teece, 2014; Collings *et al.*, 2018), HR policies positioned as dynamic capability refer to “the capacity of the organization to purposefully create, extend, or modify its resource base” (Helfat *et al.*, 2007, p. 4), via people-intensive or centric practices, such as assignment preparation, job autonomy and novelty (variability in the required professional skills), organizational support, communication and feedback throughout the assignment and supervisory coaching. Dynamic policies tend to be supported by core routines and processes, mirroring a shifting emphasis on flow or process notions of human capital, as opposed to a more traditional static or stock perspective of human capital (Collings *et al.*, 2018).

The importance of supply availability, recruitment practices and employee willingness for enabling international companies to compete effectively has long been recognized (McNulty and De Cieri, 2011; McNulty and Inkson, 2013). Involving people in an international work assignment who are not able to do or do not want to do the work, and everything involved in their management becomes more difficult (Bonache *et al.*, 2021). For business assigned expatriates, most companies tend to depend or rely almost exclusively on internal candidates for their expatriate positions (Shen and Lang, 2009). Recent reports (Brookfield, 2016; KPMG, 2020) mention that at least 80% of international business assignees are internal candidates. More dynamic and flow-based policies and diversification of talent sources are mentioned as emergent trend, primarily aimed to leverage supply availability issues (Bonache *et al.*, 2018). Justification for this is largely driven by the strategic value ascribed to international assignments and the importance given to expatriates understanding the company’s culture, processes and systems. This means that already-employed candidates may have relevant advantages over external applicants. But not all member of existing staff may want to live and work in a different country (Pate and Scullion, 2009; Pinto *et al.*, 2012; Perera *et al.*, 2017; O’Donohue *et al.*, 2018; Sherman and Morley, 2018).

#### *Willingness and psychological contracts of expatriates*

Despite the benefits that can be associated with international work assignments (Halsberger and Brewster, 2009; Doherty *et al.*, 2011; Makela *et al.*, 2016), as previous studies employing data from the US, Australia and Japan show, recruiting candidates remains challenging for MNCs, because few employees willingly accept an opportunity entailing international mobility (Tharenou, 2008; Mol *et al.*, 2009; Pate and Scullion, 2009; Peltokorpi and Froese, 2009; Froese and Peltokorpi, 2011; Pinto *et al.*, 2012).

A significant body of research has examined antecedents and/or manifestations of expatriation willingness, for mature economies and consolidated MNCs (Aryee *et al.*, 1996;

Brett and Stroh, 1995; Suutari and Makela, 2007; Tharenou, 2008; Doherty and Dickmann, 2009; Haslberger and Brewster, 2009; Hippler, 2009; Mol *et al.*, 2009; Pate and Scullion, 2009; Peltokorpi and Froese, 2009; Froese and Peltokorpi, 2011; Dickmann and Baruch, 2011; de Eccher and Duarte, 2016; Waxin *et al.*, 2019; McNulty and Brewster, 2019). Employee's motives and willingness to accept an international assignment are key elements to be considered when examining expatriate recruitment practices.

Expatriation willingness, defined as the likelihood of an individual accepting an expatriation job offer (Mol *et al.*, 2009), constitute a relevant predictor of expatriate success (Tharenou, 2008; Peltokorpi and Froese, 2009; Froese and Peltokorpi, 2011) and time to proficiency (Waxin *et al.*, 2019). Unwilling candidates are less likely to accept expatriate assignments and remain in the host country till the end of their assignment (Tharenou, 2008). In general terms, individuals can embrace expatriate assignments for a variety of reasons, often in combination. More specifically, economic recessions are considered typical push factors associated with the host country, while financial incentives or accelerated career advancement are pull factors that attract people to move abroad to a specific host country. Push factors are usually associated with migrant motivations for moving abroad, while pull factors are more commonly related to expatriates' willingness, as for this group, mobility and relocation tend to emerge not as a compulsion, rather involving organizational influences and career and/or self-development motives (Doherty *et al.*, 2011).

Though expatriation has diversified greatly in recent decades, with the growth of self-initiated expatriation, more short-term, flexible and commuter assignments and a broadening of the business expatriate profile (Bonache *et al.*, 2018; Finaccord, 2019; KPMG, 2020; Bonache *et al.*, 2021), there has been limited research examining expatriate willingness relations with psychological contracts in these increasingly diverse contexts (O'Donohue *et al.*, 2018; Sherman and Morley, 2018). Psychological contracts refer to employees' beliefs regarding the terms and conditions of their exchange agreement with their employer (O'Donohue *et al.*, 2018). Within the psychological contract literature, two main types of contracts have been identified: the relational and the transactional one (Rousseau, 1990; Yan *et al.*, 2002). Relational psychological contracts are based on a shared mutual interest in sustaining the employment relation long-term and are characterized by a focus on perceived socio-emotional obligations such as personal support, developmental opportunities and fair treatment. In contrast, transactional psychological contracts are considered short-termed, economic-oriented and focused on matters such as compensation and job security (O'Donohue *et al.*, 2018).

Authors such as Guzzo *et al.* (1994) and Pate and Scullion (2009) have suggested that some work settings and arrangements can constitute events that bring additional complexities, heightening the intriguing and nuanced nature of psychological contract processes. One such arrangement is that between expatriate employees and their employing organizations, these authors suggest, due to the influence of diversified social cues on individual perceptions, and the possibility of multiple influencing parties beyond those associated with the traditional relational and transactional psychological contract type (Perera *et al.*, 2017). To this regard, Pate and Scullion (2009) suggest that employer organizations can be perceived as not adequately meeting their obligations to expatriates, particularly regarding how the assignments are enacted and managed, and how the employment relation is maintained during the international assignment. These authors suggest that for expatriate employees, employment relations can be perceived as more transactional in nature, with little care or concern about expatriates' emotional needs being invested by companies, with diverse responses being observed in consequence. A recent study (Pinto *et al.*, 2012) suggests that this constitutes a sensitive topic in Portuguese MNCs, as assigned expatriates can relocate because they felt compelled to do so by their employing companies. In the study conducted by Pinto *et al.* (2012), a sounding result from the interviews made with 30 Portuguese expatriates



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and repatriates, was the circumstance of 50% of the relocated employees feeling compelled to accept an international assignment by their employing companies. Initially reluctant to accept the assignment, this resistance eventually faded away when they realized the personal and career costs involved in that positioning. A promotion at destination, better career prospects and other attractive terms and conditions played a role in convincing these reluctant individuals to pack up and go.

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*Relation between MNCs policies, willingness and psychological contracts of expatriates: using a job demands-resources (JD-R) lens*

For business expatriate individuals, work-related contextual resources are increasingly acknowledged as means to reduce strain and prevent willingness and psychological contracts impairment (Kawai and Mohr, 2015). For example, for expatriates, job role conflict, ambiguity and/or novelty contribute significantly to different dimensions related with job burnout and performance erosion (e.g. depersonalization, broken psychological contracts, reduced personal accomplishments) (Biswas *et al.*, 2021). Employees on international assignments typically know less about the content of an assignment and its context than employees on new domestic assignments, and can be thus subjected to more uncertainty, a sense of loss and accumulated psychological strain (Kawai and Mohr, 2015). This effect can be accounted for by the impact derived from unclear roles and assignment planning, with scarce buffering or coping opportunities being provided by company policies.

Business expatriates can gain resources conducive to their work-related motivation and willingness level particularly through organizational support and policy measures (Biswas *et al.*, 2021). In addition to this, employment-related resource gains are suggested to be more important in the context of perceived resource losses (Halbesleben *et al.*, 2014). As proposed by the JD-R model (Bakker *et al.*, 2007; Demerouti and Bakker, 2011; Rattrie and Kittler, 2014; Bakker and Demerouti, 2017), job resources (such as autonomy, organizational support or job security) play an important role in preventing performance impairment, also acting as antecedents to motivation-related outcomes such as improved commitment, willingness and dedication. Two key additive effects are proposed in the JD-R model. Firstly, an impairment pathway, where poorly designed jobs or chronic job demands activate an energy depletion process which can lead to negative outcomes such as turnover intention, sickness absence or burnout. Secondly, a motivation-enhancing pathway, where job resources carry motivational potential leading to positive outcomes such as increased willingness and commitment, performance and engagement (Rattrie and Kittler, 2014; Rattrie *et al.*, 2020). Two key interaction effects—buffering and coping—between job demands and resources are also proposed by the model. First, there is the assumption that job resources buffer the negative impact of job demands on burnout. Second, the coping hypothesis proposes that job resources are particularly prominent in conditions of high job demands, because individuals draw on resources as coping mechanism.

While there is increasing empirical evidence suggesting that there are demands and resources specific to international work settings (in particular, expatriate workers) (Lazarova *et al.*, 2010; Mahajan and De Silva, 2014; Ren *et al.*, 2015; Biswas *et al.*, 2021), where “(. . .) much is demanded of the individual in terms of adjusting and functioning in a new context” (Lauring and Selmer, 2014, p. 19), and it seems reasonable to recommend a reduction of job demands and an increase in job resources available to the employees embedded in the international assignment context, authors such as Rattrie and Kittler (2014) suggest that a more robust international extension or adaptation of JD-R model (Bakker *et al.*, 2007; Demerouti and Bakker, 2011; Rattrie and Kittler, 2014; Bakker and Demerouti, 2017) still has to be developed, namely with a focus on expatriation to (or from) less researched countries (such as Portugal), to remove blind spots of under-researched regions and economies.

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## Methods

The study sought to expand upon existing knowledge concerning company policies and individual willingness to engage with a specific type of international work regime (assigned business expatriations) (McNulty and Selmer, 2017), in developing economies, taking Portugal as use case example. To explore existing practices within a real-life context, a qualitative approach with descriptive purposes (Yin, 2003; Ragin and Amoroso, 2011) was adopted. Global staffing practices for business expatriation assignments enacted by MNCs located in a peripheral economy (Portugal) were considered as unit of analysis, with two themes being analytically explored: (1) company expatriate policies (and recruitment systems) and (2) employee willingness (to go).

The empirical basis for the research is provided by cases of Portuguese MNCs actively engaged in international expansion efforts since 2009 economic and financial crisis (Esteves *et al.*, 2018). A purposive sample of five cases was chosen, with cases and business contexts selected due to their relevance to the study, in terms of diversity and typicality. Cases were selected that fulfilled the following conditions: (1) the company should be registered in Portugal and owned by Portuguese-based interests, (2) the company should have operations in host countries and not just direct or indirect exports to that countries, (3) the firms should belong to different business sectors, and be of different sizes, thus providing a glimpse of the Portuguese particularly heterogeneous multinational firm reality (Amador and Cabral, 2014; Forte and Moreira, 2018; Silva *et al.*, 2018; Cabral *et al.*, 2020). Regarding these criteria, in addition to companies operating in mature Portuguese economic sectors (e.g. Retail, Construction), ventures with recent growing contribution to the Portuguese economy internationalization were considered (e.g. utilities, management services and IT–software development) (Banco de Portugal, 2015, 2016; Cabral *et al.*, 2020), assuming that there were differences among the companies to be examined in each sector. The five cases that were empirically considered are presented in Table 1.

The study employed two types of empirical data collection techniques. The first technique involved the use of statistical and documental sources, which were publicly available or provided by the companies under study, while the second technique encompassed semi-structured interviews with company managers and business expatriates. Regarding the use of statistical sources and documents, the main goal was to allow overall contextual descriptions of the business settings under study. A total of 200 different documents were collected for analytical work. Interviews had dual objectives depending upon the interviewee. The objective of interviews with company managers was to depict business and international expansion operating conditions, international work regimes, and company expatriation staffing practices. In the case of interviews with expatriate workers, the objective was to explore the core attributes of expatriation staffing as a lived experience and identify key willingness drivers and/or outcomes (Mol *et al.*, 2009).

Interviewed assigned business expatriates were chosen based upon a set of predefined criteria, seeking out diversity and typicality of experiences. Based on existing literature evidence, five assignee selection criteria were proposed and shared with specific point of contacts at each company, typically HR managers tasked to act as gatekeepers (Shenton and Hayter, 2004). The first criterion focused on employment track of expatriate individuals (number of different employers and domestic service track in present employer) (Suutari and Makela, 2007; Sullivan and Baruch, 2009; Suutari *et al.*, 2012). Previous international work experience (number of years working in international environments) formed a second selection criterion (Caligiuri *et al.*, 2009; Suutari *et al.*, 2017; Kim *et al.*, 2019; Waxin *et al.*, 2019). The length of the current or most recent international mobility experience constituted the third criterion (Sullivan and Baruch, 2009). The fourth factor considered by this study was the employee's present career stage (Suutari *et al.*, 2012) – four points were mapped, inspired by Super's theory (1957): early/self-exploration career stage, expansion, plateau/stagnation and

**Table 1.**  
Business contexts  
attributes

Company (fictitious ID)	Business sector	Governance	Yearly turnover (2016)	Number of employees (2016)	Founding date	Start of internationalization process (first year)	International outreach (number of countries/markets)	Expatriate policies	Number of expatriate employees (2017)	% Expatriate Employees (2017)
"Luz de Sempre"	Utilities – Energy	Private (with a public stakeholder)	3.759 million euros	12.000	1976	1996	14 countries	- Created in 2014 - Functional	25	(<1%)
"Grossista"	Retail and Distribution	Private	5.376 million euros	44.000	1959	1990	89 countries	- Created in 2012 - Functional	30	(<1%)
"Excel"	Management Consulting	Private	80.2 million euros	244.000 (2.300 in Portugal)	2002	1993	150 countries (presence in Portugal)	- Created in 2013 - Dynamic	100	4.35%
"Tabique"	Construction	Private	2.210 billion euros	25.383	1946	1946	25 countries	- Created in 2013 - Functional	1,264	4.98%
"V&V"	IT – Software Development	Private	30 million euros	400	1998	1999	5 countries	- Created in 2013 - Dynamic	41	10.25%

**Source(s):** Annual business reports; self-made table



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end of career stage. Finally, it was considered each expatriate individual family situation (e.g. the existence of young children, elderly dependents, accompanying partners or family) (check [Table 2](#), for details). In total, 37 individual interviews were conducted, both in-person and remotely, of which 13 were company managers and 24 with expatriate workers. A detailed description of these is provided in [Table 2](#).

Interviews with company managers were conducted in-person and lasted an average of 80 min. Of the 24 interviews with expatriate workers, 13 took place remotely, via Skype or a similar platform, with four of the interviews utilizing solely audio due to communications infrastructure issues. Interviews with expatriate workers lasted an average of 120 min. For the sake of feasibility, this study utilized data saturation criteria ([Strauss and Corbin, 1998](#)) to limit the number of individual cases considered at each company.

Analytical work was theoretically driven. Company contextualization, in terms of company expatriate policies and systems, was accomplished considering three dimensions: (1) degree of formality, (2) openness/inclusiveness of existing policies and (3) dynamic/functionalist approach of existing policies ([Harris and Brewster, 1999](#); [Anderson, 2005](#); [Helfat et al., 2007](#); [Tungli and Peiperl, 2009](#); [Shen and Lang, 2009](#); [Linden and Teece, 2014](#); [Collings et al., 2018](#); [Kandogan, 2018](#)). Expatriate willingness analysis and its relation with psychological contracts was driven by existing literature ([Suutari and Makela, 2007](#); [Tharenou, 2008](#); [Doherty and Dickmann, 2009](#); [Haslberger and Brewster, 2009](#); [Mol et al., 2009](#); [Pate and Scullion, 2009](#); [Peltokorpi and Froese, 2009](#); [Froese and Peltokorpi, 2011](#); [Dickmann and Baruch, 2011](#); [de Eccher and Duarte, 2016](#); [Perera et al., 2017](#); [O'Donohue et al., 2018](#); [Sherman and Morley, 2018](#); [Waxin et al., 2019](#); [McNulty and Brewster, 2019](#)), and focused on checking the existence of tensions between structural conditions and personal positioning, possibly molding employee willingness outcomes/manifestations and psychological contracts evaluation shifts. Collected empirical data were analyzed and thematically categorized using MaxQDA v.12.2961 data segments were coded and then condensed in 61 thematic categories. Further analytical work was anchored in cross and intra-context analysis and sought to articulate managerial perspectives with individual perceptions and positioning. Meta-themes resulting from analytical work constitute the major findings presented in the *Results* section, with the help of empirical illustrations derived from collected data. To guarantee confidentiality and anonymity, names of both companies and individuals are omitted.

## Results

Key empirical findings are presented in two axes, closely following the research question: (1) willingness profiles and psychological contracts of expatriates, (2) company policies as qualifying resource of willingness and psychological contracts.

### *Willingness profiles and psychological contracts of expatriates*

Divergent expatriate motives, dependencies and willingness profiles were observed. Alignment with assignment conditions was driven by different means, and was not, in most cases, surefooted or linear. Overall, three profiles of expatriate willingness were considered to mirror different types of employee positioning toward going abroad: *conformist expatriates*, *protean expatriates* and *disrupted expatriates*. For this proposed grouping, different types of psychological contract were observed: relational, transactional and breached traditional psychological contract ([Rousseau, 1990](#); [Yan et al., 2002](#); [Solinger et al., 2016](#)), respectively (check [Table 3](#), for details).

*Conformist expatriates* were noticeably characterized by opt-in decisions driven by passive accommodation to proposed assignments, a sense of conscious obligation toward existing

**Table 2.**  
Expatriate individuals

Expatriate employee	Company	Employment position/status	Age	Sex	Academic Background	Overall employment track (# employers   # years)	Employment track in current employer (# years)	Previous international work experience?	Expatriation length (# years)	Accompanying family?	Host country	Career stage
"Isaac"	"Luz de Sempre"	Top Manager	65	M	Electrotechnical Engineering, BSc	2   44 y	37	No	17	Yes (partner)	Brazil	3. Plateau-Stagnation
"Jôana"	"Luz de Sempre"	Technical/Specialist	39	F	Accounting, BSc	7   20 y	12	No	1	No	France	3. Plateau-Stagnation
"Heitor"	"Excel"	Technical/Specialist	34	M	Computer Engineering, MSc	3   10 y	3	No	4.5	No	Denmark	2. Expansion
"Gaspar"	"Luz de Sempre"	Technical/Specialist	28	M	Management, MBA	2   4 y	3	No	1.5	No	Hong Kong	1. Beginning
"Antônia"	"Luz de Sempre"	Technical/Specialist	33	F	Management, BSc	2   11 y	9	No	2	No	Brazil	3. Plateau-Stagnation
"Gil"	"Luz de Sempre"	Middle Manager	67	M	Electrotechnical Engineering, BSc	1   38 y	38	No	5	No	Brazil	4. End
"Silvestre"	"Luz de Sempre"	Technical/Specialist	29	M	Management, MSc	1   7 y	7	No	0.5	No	Brazil	1. Beginning
"Dinis"	"Excel"	Technical/Specialist	33	M	Computer Engineering, MSc	5   10 y	2.5	No	4	No	UK	2. Expansion
"Enzo"	"Luz de Sempre"	Top Manager	71	M	Electrotechnical Engineering, MSc	2   36 y	30	Yes	13	Yes (partner)	Macau; Brazil	2. Expansion
"Francisco"	"Luz de Sempre"	Middle Manager	67	M	Electrotechnical Engineering, BSc	4   31 y	25	No	5	No	Brazil	3. Plateau-Stagnation
"Carlos"	"V&V"	Middle Manager	38	M	Computer Engineering, BSc	1   17 y	17	No	3	No	Angola; Mozambique	3. Plateau-Stagnation
"José"	"Luz de Sempre"	Middle Manager	60	M	Computer Engineering, BSc	1   33 y	33	No	4	No	Morocco	3. Plateau-Stagnation
"Xavier"	"V&V"	Middle Manager	38	M	Computer Engineering, BSc	1   15 y	15	Yes	2	No	UK	3. Plateau-Stagnation
"Rui"	"V&V"	Middle Manager	30	M	Computer Engineering, BSc	2   7 y	5	No	2	No	UK	2. Expansion
"Violeta"	"Tableque"	Middle Manager	34	F	Clinical Psychology, BSc	2   10 y	9	No	1.5	No	Mexico	3. Plateau-Stagnation
"Nuno"	"V&V"	Middle Manager	46	M	Management, BSc	3   24 y	10	No	2	No	Angola	3. Plateau-Stagnation
"Filipa"	"V&V"	Technical/Specialist	28	F	Mathematics, MSc	1   3 y	3	No	0.5	No	Germany	1. Beginning

(continued)

Expatriate employee	Company	Employment position/status	Age	Sex	Academic Background	Overall employment track (# employers   # years)	Employment track in current employer (# years)	Previous international work experience?	Expatriation length (# years)	Accompanying family?	Host country	Career stage
"Augusto"	"V&V"	Technical/Specialist	33	M	Computer and Systems Engineering, MSc	1   9 y	9	No	6	No	Angola; Mozambique	2. Expansion
"Filipe"	"V&V"	Technical/Specialist	37	M	Computer Engineering, BSc	1   13 y	13	No	7	No	Angola; Mozambique	2. Expansion
"Aurélio"	"Tabique"	Middle Management	67	M	Economics, BSc	3   38 y	36	No	18	Yes (partner)	Angola; Mozambique; Poland; Czech Republic	2. Expansion
"Mário"	"Tabique"	Middle Manager	38	M	Civil Engineering, BSc	1   15 y	15	No	2.5	No	Angola	2. Expansion
"Miguel"	"Tabique"	Middle Manager	40	M	Finance, MBA	2	17	No	5	Yes (partner and children)	Brazil	2. Expansion
"Tiago"	"Tabique"	Technical/Specialist	30	M	Civil Engineering, MSc	2	5	Yes	6	Yes (partner)	Spain; Malawi; Peru	1. Beginning
"Duarte"	"Tabique"	Technical/Specialist	38	M	Civil Engineering, MSc	1	15	No	7	No	Angola; Mozambique; South Africa	2. Expansion

Source(s): Self-made table

Table 2.

Profile	Contingent variables (dependencies)	Willingness and psychological contract (manifestations)
<i>Conformist expatriates</i> (n = 6)	<ol style="list-style-type: none"> <li>(1) <i>Employment status</i>: Medium (middle managers; technical/specialists)</li> <li>(2) <i>Employment track</i>: Long domestic relation with current employer (at least, five years)</li> <li>(3) <i>Previous international work experience</i>: Low (up to one year)</li> <li>(4) <i>Career stage</i>: Expatriation follows “Plateau” or is “End of Career” stage</li> <li>(5) <i>Expatriate policy</i>: Functionalist or Dynamic</li> </ol>	<ul style="list-style-type: none"> <li>- Opt-in decision driven by mutual trust and past and future reciprocity expectations</li> <li>- Traditional psychological contract, based on a perceived shared mutual interest in sustaining the employment relation long-term</li> <li>- Expatriate willingness of a conformist nature, manifested or subsumed to the goal of preserving existing psychological contract and maintain a sense of social and organizational continuity</li> </ul>
<i>Protean expatriates</i> (n = 11)	<ol style="list-style-type: none"> <li>(1) <i>Employment status</i>: Medium or high (middle or top managers)</li> <li>(2) <i>Employment track</i>: Short to medium term relation with current employer (1–3 years)</li> <li>(3) <i>Previous international work experience</i>: Moderate (1–3 years)</li> <li>(4) <i>Career stage</i>: Expatriation as “Beginning” or “Expansion” stage</li> <li>(5) <i>Expatriate policy</i>: Dynamic</li> </ol>	<ul style="list-style-type: none"> <li>- Opt-in decision is primarily opportunistic and utilitarian: assignment viewed as career advancement resource/capital</li> <li>- Transactional psychological contract, short-termed, oriented to economic or social capital gains</li> <li>- Expatriate willingness of a transactional nature, mirrored in attempts to leverage existing international work assignments as strategic opportunities to expand individual action and career resources possibilities</li> </ul>
<i>Disrupted expatriates</i> (n = 7)	<ol style="list-style-type: none"> <li>(1) <i>Employment status</i>: Medium (middle managers; technical/specialists)</li> <li>(2) <i>Employment track</i>: Medium to long relation with current employer organization (at least, 3 years)</li> <li>(3) <i>Previous international work experience</i>: Low (up to one year)</li> <li>(4) <i>Career stage</i>: Expatriation follows “Plateau” stage</li> <li>(5) <i>Expatriate policy</i>: Functionalist</li> </ol>	<ul style="list-style-type: none"> <li>- Opt-in decision marked by passive/defensive behaviors and resignation, an overall sense of beyond of personal control dependency (career stagnation and/or lack of options, fear of unemployment)</li> <li>- Compelled opt-in decision heightening the chance of dysfunctional expatriate adjustment, as well as reports of psychological contract breaches or violation, with impact in expatriate performance (e.g. early return decisions, voluntary dismissal)</li> <li>- Expatriate willingness seems broken, being manifested through withdrawal behaviors and hyphenated job commitment</li> </ul>

**Table 3.**  
Expatriate willingness profiles

**Source(s):** Self-made table

exchange commitments and expectations with the current employer, as well as by a need to confirm and sustain organizational belongingness continuity. For this group, the way to reason expatriation assignments is characterized by a need to conform to managerial and business decisions, sustaining psychological contracts of a relational kind (O'Donohue *et al.*, 2018). A fusional sense of complicity emanates from past long-term domestic service with the current employer. In specific cases, a sense of (moral) debt toward the employer organization was also registered. This willingness profile was primarily observed in individuals (six of 24 interviewees) with long domestic service trajectories within companies where they work(ed) for as expatriates:

Initially I came to be here till 2012, then it changed to 2014, to 2016, which, later, shifted again to 2017. And getting here [. . .] I am making a prediction – I will end my career where it started in 1981 in Angola. This is what I expect to happen. Now, I have an outlook for the future. I will be here working until I cannot. That day will come, someday in the future [. . .] I will be doing my best for the company. (Aurélio)

I do not know if I was the first, third or fifth choice, it does not make a difference to me. Happily, or unhappily, I am the one who is here now. (Nuno)

In my case, something that helped was that I had already spent many years at the company. Let's say that I knew the core of the company, including the administration board and long-term senior employees. There are always people joining and going, but I have kept in touch with these key people, which has allowed me to manage things in an agile manner, maintaining me in-sync with the company's mindset. (Filipe)

In contrast, *protean expatriates* seek to actively carve their expatriate assignment as an opportunity to emancipate from external contingencies, expanding individual action possibilities (Breitenmoser *et al.*, 2018). For this group, willingness drivers and opt-in decisions are primarily utilitarian: expatriation policies and job assignments are viewed as career advancement resources. Sustaining Pate and Scullion (2009) suggestion, for this group of expatriate employees, employment relations were perceived as more transactional and short-termed in nature: being or becoming a business expatriate was mainly seen, therefore, as a strategic resource to collect present and future advantages, to exercise oneself in a different role, to enlarge a social network:

I am not looking for a profound friendship with the company. I do not feel the need to belong to something. I represent the company, and I feel that I should do so to the best of my ability, to not leave the company worse off, but I do not feel as if I have any obligation to the company, nor does the company have any obligation to me. (Rui)

When I decided to go to the company headquarters in Portugal, I assume I would leave the construction projects behind. It was a turning point in terms of self-recognition and recognizing that this was not for me. In Mozambique, the company made great efforts to convince me to take over production and projects again. I did not do it. I was not a good fit, and that was not what I wanted. Naturally, I faced all the consequences associated with that decision. (Duarte)

For this group of expatriate employees (11 of the 24 interviewees), to be able to choose one's working circumstances, as well as to own decisions guiding one's life and employment trajectory, constitutes a key motivational driver, a primary influence in the way relations with work and managerial practices, evolve with time:

My lifestyle is a choice. It is not easy – it is a difficult choice. I do not think I will be able to live like this for many more years, but it was what I chose for myself at that time. It is possible that my ambition is the biggest driver of this choice. (Dinis)

To me, it is necessary [when managing one's career] to take action to make things happen more quickly. (Rui)

For *protean expatriates*, there is, essentially, a “path” (Rui), a “journey”, a “going forward movement” (Duarte) – a trajectory, not to be followed, but to be owned and mastered. In this regard, the focus on the “journey” tends to render conformation to external contingencies as being secondary. Maintaining a sense of autonomy and contextual independency is the key: as a result, an expatriate experience emerges as a useful act or event, anchored in the expectation of future gains and benefits:

[Did you feel like your life was somewhat on-hold, during your expatriation?] No. It was a part of my journey. Currently, I am continuing to move forward. Independent of where I am, I continue to move forward. (Duarte)

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For me, my career is my journey – a professional journey and personal experience that I can use to find a new job, for example. (Rui)

I was always an ambitious person, professionally-speaking. In Portugal, I did not see much of a professional future. I had reached what was the end of my career path [. . .]. My main motivations [for expatriation] were the notions that my career had stagnated in Portugal and the expectation of having new experiences abroad. (Isaac)

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Throughout the analysis of the collected empirical evidence, the existence of a specific group of *disrupted* individuals established itself as a significant research finding. For these individuals, expatriation represented a moment of social and employment discontinuity, violation of existing (relational) psychological contract, implying withdrawal and defensive behaviors, short-wired involvement, an overall sense of contextual dependency where company policies tended to act as a push factor. Two attributes were shared by these individuals: previous scarce personal, family and professional international experience or exposure; expatriation opt-in decision mainly driven by external contingencies (e.g. direct managerial nudging and compelling efforts, fear of unemployment, career stagnation or lack of career development options) (check [Table 3](#), for details). For five of the seven expatriates fitting this group, their expatriation experiences represented their first international work experience, an experience considered to be not entirely desirable or sought out:

Actually, I never imagined that I would partake in an international mobility experience. (Violeta)

To be honest, going abroad was always a possibility, but it was still unexpected. I have never looked for this. It just happened, by chance. (Francisco)

I think that nothing in my previous trajectory influenced where I am. There are people who openly state that they do not mind traveling or going abroad. There are many companies that need help because they cannot send the work to Portugal. My case was not exactly like that. (Filipa)

*Disrupted expatriates* were those individuals, whose willingness was primarily manifested by conditional commitments, as well as by a preference to withdraw and protect themselves from what was perceived as disrupted social exchange context and ill-defined company policies, carrying effects whose possibility of personal control seemed remote and/or unfeasible. In most cases, as observed in [Pinto et al. \(2012\)](#), for this group of individuals, following initial rejections, a decision to go abroad was made because another viable option was not available – despite the reluctance, going abroad was the best option among the (perceived) available ones. Core defining aspects of each observed expatriate willingness type and manifestations are summarized in [Table 3](#).

Three factors seem to contribute as significant dependencies to divergent willingness (to go) profiles, in the considered business contexts and expatriate cases. The first factor concerns the intersection of the expatriation experience with the existing domestic employment trajectory and current career stage, with relevant differences being observed between individuals to which access to an expatriation is linked as significant episodic event ([Sherman and Morley, 2018](#)) with an expansion stage (*protean expatriates*), and others where it represented a possible solution for a plateau/stagnation (*disrupted expatriates*) or an end of career stage (*conformist expatriates*). A second factor emerged from the existence of past global work experiences or exposure to international work environments, a career resource *protean expatriates* actively and opportunistically ([Yan et al., 2002](#)) put in practice to sustain their assignment opt-in decisions.

In contrast to what was observed with *conformist expatriates* and *protean expatriates*, *disrupted expatriates*' willingness wasn't framed by a sense of obligation, trust and reciprocity, or a quest for personal challenge or networking opportunity carving. When closely examined, in contrast to what was observed for *protean expatriates*, *disrupted*



*expatriates* did not value international mobility as condition for possible expanded action, a positive demand, but, rather, as context for impaired performance and commitment, a motive for displacement, disappointment and “uprooting” (Mário):

It was an experience. In my opinion, it was a consistently uprooting experience. In general, I knew it would be, but still, I always felt like I was being uprooted. To me, expatriation is an uprooting moment. In my case, I was able to replant my roots here, in Portugal. But many must plant their roots elsewhere, which is something I cannot imagine doing. This is a very common situation that is extremely present today and at this company, as well. The reality is that there are either roots for the company or roots for the worker, and the reconciliation of these perspectives is impossible. (Mário)

For this expatriate group, a sense of lived caesura constraint raised from the exposure to a life and work condition (being or becoming a business expatriate) understood as out-of-the-ordinary, which, in some cases, replaced a previously existing traditional (Yan *et al.*, 2002) and conformist sense of organizational belonging. This type of experience was linked to a sense of breached psychological contracts (Haslberger and Brewster, 2009; Pate and Scullion, 2009; Solinger *et al.*, 2016), where opportunities to maintain previously existing social bases of mutuality and reciprocity, were temporarily or permanently put on-hold. If utilitarian perspectives contribute to make a business expatriation a strategic career resource for *protean expatriates*, a sense of constraint among *disrupted expatriates* is justified by a strong disjunctive sense experienced by these individuals. Context is seen as being adverse: for *disrupted expatriates*, becoming an expatriate constitutes a situation not fully sought, where scarce of no chance to exercise personal control is or was observed. Truncated, distanced involvement informs social behavior, as expatriation is defined as happening “by chance” (Francisco), or as the product of “external circumstances” (Mário). The majority of these individuals counted “the days left” (Mário) for the(ir) expatriation to end. Feelings of strain, ambiguous paradox and impairment were common, as well as multiple mentions of “life suspension” (Violeta), “being uprooted” and/or “caesura” (Tiago). In the considered contexts, for this grouping, employee willingness (to go) derived of significant managerial compelling behaviors:

I feel like I have changed a lot. I feel different. I realized that, when I temporarily return to Portugal, for a couple of weeks, I always feel out of place. Although I am in close contact with family and friends through social networks and *Skype*, it is not the same. In Malawi, where I am, and in Peru, my work frames and framed my entire life. I met many different people. However, I feel that I am not at home there, and that I am always waiting to go back to Portugal. But, when I return, I feel excluded from conversations and from what is happening in the country. (Tiago)

Despite keeping in touch, I am not in Portugal. I am always missing things – dinners, birthdays, events. Here, we do not have a lot of contact with the locals. I end up feeling uprooted – being neither here, nor there. It is as if we are on-hold. (Tiago)

There are cases where expatriates do not invest themselves in life there [point of origin], because they do not know how long they will be there, but they also do not invest themselves in life here, since they are not here. My case is like that, but it is not the same for everyone. There are some people who return from time to time, while others bring their families. I am still paying rent in Portugal. My things are still there, in my house, but I do not remember the last time that I slept there. (Filipa)

In Brazil, I spent a lot of time with myself. [. . .] During the week, I only worked. There were those who liked to interact with locals [. . .] I do too, but if I had to be alone, it does not bother me much. (Francisco)

A third and last factor contributing as dependency to observed divergent willingness profiles was the role played by job resources (such as autonomy, organizational support or job security) as provided by company expatriate policies molded by different orientations. Divergent willingness profiles suggest, as illustrated, that expatriate individuals shouldn't be

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viewed or conceived as latent conformists of managerial intentions. Observed differentiation indicates that there is room for willingness levels optimization, in the considered contexts and cases, and that for developing international work contexts such as Portugal, where expatriation may constitute a condition perceived as particularly demanding (a demand level not necessarily conceived as positive or manageable by individuals, as illustrated), the qualifying role played by company expatriate policies is made particularly prominent as coping instance or mechanism (Bakker *et al.*, 2007; Demerouti and Bakker, 2011; Rattrie and Kittler, 2014; Bakker and Demerouti, 2017). Due to its significance regarding the research goals, this finding is further developed in the following sub-section.

*Company policies as qualifying resource of willingness and psychological contracts*

As proposed by the JD-R model coping hypothesis (Bakker *et al.*, 2007; Demerouti and Bakker, 2011; Rattrie and Kittler, 2014; Bakker and Demerouti, 2017), job resources, as provided by company policies, are particularly relevant in conditions of high job demands, because individuals draw on these resources at times of stress as means of coping. Furthermore, for job resources to be effective at creating willingness-enhancing outcomes, individuals must be presented with a demand that is perceived as a positive challenge (Demerouti and Bakker, 2011; Bakker and Demerouti, 2017). To this regard, in the considered cases, differentiation effects were registered, with functionalist company policies falling short, to some extent, as enabling or qualifying means that ensure willingness alignment and/or optimization, operating, in some contexts and cases, as push factors.

Overall, in what concerns possible links established between MNCs policies, willingness and psychological contracts of expatriates, similarities and differences were registered for the considered cases and business contexts. In terms of similarities, first it should be highlighted that all considered 24 expatriate individuals were internally recruited, regardless the job role scope and status (low/medium/high) being considered. Among 63% of the interviewed business expatriates (15 of the 24 interviewees), internal recruitment resulted from deliberate, direct invitations made by the employer company. Compelling managerial behaviors to forge assignment acceptance (Pinto *et al.*, 2012) were registered in 30% of cases. As a result, in the cases examined, direct invitations to partake in expatriation assignments were dominant in multiple companies (e.g. “Luz de Sempre”, “Tabique” and “V&V”), as well as references to the existence of “distinct compensation packages available for selected groups in the company that engage in expatriation regimes” (HR Manager, Grupo “Tabique”), particularly noticeable in what concerns accompanying family support, where packages tend to be reserved to top managers by ad-hoc agreements. These company practices signal the existence of subsidized conditions for professional development, a closed system (Harris and Brewster, 1999) made available only for specific segments of existing staff, as well as the specific and differential valuation given to the role (to be) performed by business expatriates. Informality and closed staffing criteria were found to be particularly acute in decisions involving “highly sensitive, CEO-like positions” (HR Director, “Tabique”, “Luz de Sempre”), or exceptionally specialized skill needed to carry out specific projects. 60% of the interviewees mentioned that their recruitment was not driven by formal criteria and systems, being granted via direct invitations, based upon proximity and personal trust – “relations that already existed in Portugal, someone who knew someone . . .” (Miguel, “Tabique”) – and the existence of choices that arose from clients’ valuation of employee domestic performance and internal employment trajectories. The portfolio of host countries being considered (e.g. Morocco, Angola, Mozambique, hills of Peru, Malawi and rural regions of Brazil), perceived as less attractive (Kim and Froese, 2012; de Eccher and Duarte, 2016), infused, in cases of elder employees, with post-colonial reverberations (“we’re going there to teach them how to work”) (Filipe, “V&V”), contribute to lengthy bargaining processes. In this context, personal references cultivated “in off-work schedules” (Miguel, “Tabique”), during “one-off critical

conversations with a director” (Carlos) or through direct appeals, “requests for help” (Isaac, “Luz de Sempre”) made by the “company’s CEO” (Nuno), were used, in specific cases, as a last refuge of “trust” (Gil, “Luz de Sempre”) and had a pivotal coordination role at this level:

There are always invitations and there are always candidates. I do not know the numbers, but there are always these two ways to access international work opportunities (Silvestre, “Luz de Sempre”).

These international positions, as you know, are appointed and depend a bit on the administrators will (Francisco, “Luz de Sempre”).

December (2016) marked one year since the company CEO personally called on me and told me that he needed my help. I had already refused this project in Angola two times for personal and familial reasons (Nuno; “V&V”).

This was the challenge that I first accepted: to go for a month and come back, go for a month and come back, go for a month and come back. After that, the company bought one of the four companies that my team had evaluated, and I was invited to stay in Brazil at that company due to the experience I had gained during the evaluation process (Isaac, “Luz de Sempre”).

One day, I received a call asking me to come to Coimbra where they asked me if I wanted to go to Brazil. [An invitation?] Yes, an invitation was formally made by one of the previous company administrators who knew me (Francisco, “Luz de Sempre”).

As mentioned by Duarte (“Tabique”), “formal rules can be different, but most of these cases [business expatriations] involve an invitation”. The existence of “invitations” contributes to expatriation assignments descriptions as work arrangements subject to multi-party managerial control (Pate and Scullion, 2009; Perera *et al.*, 2017), made by MNCs and by their clients. As frequently mentioned in interviews, in international expansion contexts, it can be understood as key priority to maintain a sense of “control”, in a context perceived as being tarnished by risk and uncertainty: clients are “demanding”, projects are “complex, pioneering efforts”, host contexts are “distinct”, conditions are “unprecedented”, it is necessary to demonstrate competence and leadership with local partners (HR Director, “Luz de Sempre”). As a result, it is important to choose and send only “the best” (among those available) (HR Director, “Grossista”). “The best” are typically those who evoke trust in the ones making decisions, and who can inspire trust themselves. In this context, considering individual willingness emerges as secondary recruitment criteria. When building expatriate pools, in most of the considered contexts (namely the ones using international projects or consortiums to anchor expansion intents), end customer’s feedback matter, influencing staffing outcomes, making the roster of potential candidates become even more finite and signaling the existence of staffing practices characterized by a strong sense of contextual dependence.

Direct invitations rejection (Bolino *et al.*, 2016) was observed in every business setting considered in the study, and cases of compelled acceptance following previous multiple rejections were registered (Mário, Nuno), mirroring divergent levels of expatriate willingness with impact in terms of psychological contracts evaluation, and the need for managers to develop deep persuasion efforts to compel candidates or chosen individuals to go abroad (Stahl *et al.*, 2002; Suutari and Valimaa, 2002; Pinto *et al.*, 2012). To this regard, “opportunities” (HR Director, “Tabique”) conducive to the acquisition of differential benefits and possible future advantages (e.g. personal development, career advancement and gaining global work experience) are stressed. At “Luz de Sempre”, company managers suggest that it is important (“decisive”) for the company and its workers to “gain international work experience” (HR Director). This is a discourse that conveys a valuation of international mobility close to an institutional or functional requirement. Additionally, management frames business expatriation as a desirable and distinct personal experience that is distinguishable from

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others, although not without difficulties. Conversely, expatriate individuals acknowledge (their) expatriation as an assignment that implies “concessions, but also benefits” (Joana; Silvestre).

Given the need to mobilize a high volume of expatriate workers and the present incommensurate nature of international work to ensure business sustainability, at “Tabique”, a construction company, it was observed deliberate actions to value international experience as an opportunity not only for “growth”, but also to preserve one’s job (Duarte; Aurélio; Mário), transforming going abroad into a condition needed to preserve one’s future career within the employer organization. At “V&V”, there is a deliberate effort, in terms of company policy, to present expatriate assignments in a neutral light, but the existence of *away-from-home* financial compensations calculated based upon hardship coefficients, help signal a possible ambivalent nature. Overall, limitations were observed in what concerns staffing decisional options, which often manifested themselves in the need to carve ad-hoc exceptions, dynamically iterate over formal established rules and policies (regarding, for example, expatriate financial compensation), and going to great lengths to maneuver rejected direct invitations:

Management called on me, invited me, and wooed me very well. I already knew there was a reputation [. . .] a tradition at this company: “*If you want to grow, you have to go abroad*”. If you want to gain visibility within the company to grow (in terms of pay, hierarchy, decision-making power, responsibility and respect), you must show that you are capable of going abroad to a different market” (Duarte, “Tabique”).

[Do you seek out workers to invite?] Yes, those who are invited are sought out. [Can those who are chosen say no?] Yes, they can say no [. . .] and some [. . .] many [. . .] do that (HR Director, “V&V”).

[You’ve mentioned that a person can reject an expatriation invitation. What happens in this situation?] Nothing. We must leverage that. We are at a point where we simultaneously lack resources for certain positions and projects and possess misplaced excessive resources for others (Production Manager, “V&V”).

[Can workers reject an invitation?] They can [. . .] and many times they do say no. We must accept their decision. In fact, the worst-case scenario would be to send someone to a client against their will. At most, what we try to do is to convince workers who are unsure of their decision. [Using what type of arguments?] We explain their importance to the company and the confidence that we have in them. We choose the most appropriate person to carry this conversation: the direct manager, HR [. . .] even, if needed, the CEO of the company. After, we appeal to their sense of mission, as the majority of those who work at the company value its brand and image, and this produce an effect that weighs upon their decision-making, but which is not always sufficient to convince workers to leave their families (Production Director, “V&V”).

As mentioned, differentiated interaction effects (Bakker *et al.*, 2007; Demerouti and Bakker, 2011; Rattrie and Kittler, 2014; Bakker and Demerouti, 2017; Rattrie *et al.*, 2020) were observed, suggesting that company policies seem to be playing a qualifying role of willingness levels and psychological contracts of expatriates, in the business contexts considered by the research.

More dynamic policy approaches were found in disaggregated production or project-based settings, where people reliance, employment relations’ coreness and client centrality to business continuity rings especially true (Malhorta and Hinings, 2010), influencing the way international workers are managed (check Table 1, for details) and the degree of job resources being provided (for example, in terms of assignment iterative planning, presence of job role novelty and/or low job role ambiguity, selective staffing and regular feedback practices) (Helfat *et al.*, 2007; Linden and Teece, 2014; Collings *et al.*, 2018). Dynamic policy were more frequently factored into trajectory-focused, protean-like willingness profiles, as well as transactional psychological contracts, as more functionalist policy approaches tended to be linked to conformist, disrupted or compelled willingness profiles (check Table 3, for details).

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Perceived JD-R challenges and imbalances (e.g. perceived contextual high demands and low job resources provided by company policies) (Bakker *et al.*, 2007; Demerouti and Bakker, 2011; Rattrie and Kittler, 2014; Bakker and Demerouti, 2017) manifested, in specific cases and contexts (*disrupted expatriates*) (Mário, Violeta, Tiago), in a sense of relative deprivation (Ren *et al.*, 2015) and, ultimately, in unmet expectations and breached psychological contracts.

Overall, functionalist policy approaches seem to generate poorer HR development environments, in terms of job-related enabling resources (e.g. assignment organization – low role autonomy or novelty, more role ambiguity/conflict – organizational support, advancement opportunities) (Bakker and Demerouti, 2017), operating as a more static framework which generates more conformist or compelled willingness profiles (Duarte; Aurélio; Mário), creating less room for willingness optimization and consistent growth-oriented orientations. Functionalist policies seem to fall short in generating job crafting orientations (Christian *et al.*, 2011; Tims *et al.*, 2013), ultimately allowing for existing resources to be conserved (*conformist expatriates*) or diminished (*disrupted expatriates*), not enhanced (check Table 3, for details).

Most *protean expatriates*, factoring on HR-enhancing practices, actively changed the design of their jobs by choosing tasks, negotiating different job content and assigning meaning to their tasks or jobs. Job crafting is acknowledged to be important to help sustain employee willingness and work-related engagement (Bakker and Demerouti, 2017). In an overall sense, willing workers (*conformist* or *protean*) tended to be more receptive to discover novel lines of thought or action and use resources provided by company policies (e.g. autonomy). Results seem to confirm therefore the hypothesis that more dynamic HR policies, in an expatriation context, tend to be more effective in maintaining or improving employee willingness levels, in contexts perceived by employees as being of high job demand.

## Discussion

Considering the study findings, two major discussion streams are suggested. First, in what concerns company policies approaches to expatriation assignments observed in the MNCs considered by the study, findings are in part consistent with the existing literature on the topic (Harris and Brewster, 1999; Anderson, 2005; Cheng and Lin, 2009; Tungli and Peiperl, 2009; Shen and Lang, 2009; Makela *et al.*, 2016; Zhu *et al.*, 2017; Kandogan, 2018). The preferential use of internal recruitment options guided or bounded by closed and informal coordination systems and staffing criteria is documented for mature MNCs and Anglo-Saxon developed economies (Tungli and Peiperl, 2009; Shen and Lang, 2009; Brookfield, 2016; KPMG, 2020), but fully relying, as observed, on internal staffing options is in contrast to benchmark references which indicate that up to 20% of business expatriate workers are progressively being externally recruited (Brookfield, 2016; Bonache *et al.*, 2018). To this regard, regardless the size and activity sector, considered cases of Portuguese MNCs seem to be doing, in terms of degree of formality and openness/inclusiveness of existing policies and systems, what larger and more mature companies did in their earlier firm international expansion stages (Cheng and Lin, 2009).

Observed interaction effects between policies, willingness and psychological contracts of expatriates suggest that policy-related incentive effects and demand-resource balances, factored as terms of social and economic trade, are non-linear and asymmetric. As result, there are (can be) unfilled gains (for companies) and expectations (employees), a sensitive outcome for developing countries and economies (such as Portugal). In theoretical terms, this confirms that company policies do operate as qualifying antecedents of expatriate willingness but dispels the myth that this occurs irrespective to its content, orientation and specification or the individuals directly involved. To this regard, in the present study, presumed symmetry and commonality of interests and motives between the employer and the employees regarding international assignments (Larsen, 2004) played a significant role, with willingness screening and objective asymmetry of expectations (30% of employees

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reluctant to go) not being acknowledged or properly addressed by company policies with a functionalist orientation.

A second relevant discussion stream concerns the role of willingness and psychological contracts of expatriates in less developed contexts such as Portugal, and the ability of MNCs operating in or from these contexts, to frame divergent motives, dependencies and shifting psychological contracts in consistent company policies and staffing systems. In the considered contexts and cases, the existence of divergent motives is consistent with evidence presented in the literature (Brett and Stroh, 1995; Aryee *et al.*, 1996; Suutari and Makela, 2007; Tharenou, 2008; Hippler, 2009; Doherty and Dickmann, 2009; Dickmann and Baruch, 2011; Waxin *et al.*, 2019), namely in European contexts (Scullion and Brewster, 2001).

The proposed grouping of expatriate willingness types (*conformist*, *protean* and *disrupted*) related with different psychological contract types – traditional, transactional, breached traditional psychological contract (Rousseau, 1990; Yan *et al.*, 2002) – and company policies with different orientations or specifications (Helfat *et al.*, 2007; Linden and Teece, 2014; Collings *et al.*, 2018). Expatriation assignments tend to be conceived as a personal, non-standard work and life experience, an episodic event (Sherman and Morley, 2018) distant from other work and life previous experiences. This representation is linked with (short) earlier international experience and employee exposure to international work settings, and somewhat aversive mobility-related attitudes (Justino, 2016). Observed divergent employee willingness profiles were indeed closely related with current career stage, previous domestic employment track (Suutari and Makela, 2007; Pate and Scullion, 2009; Sullivan and Baruch, 2009; Suutari *et al.*, 2012) and international work experience (Caligiuri *et al.*, 2009; Suutari *et al.*, 2017; Kim *et al.*, 2019; Waxin *et al.*, 2019) and cultural distance (Froese and Peltokorpi, 2011; Kim and Froese, 2012) understood as significant (and unappealing).

As suggested by Solinger *et al.* (2016), a sense of violation and breach was particularly intense (and possibly harder to repair) in cases of traditional psychological contract (*disrupted expatriates*). As observed and illustrated, divergent expatriate motives and willingness profiles influence supply availability, not only in terms of volume/quantity, but also in terms of its quality and readiness to perform (Waxin *et al.*, 2019), and the managerial effort implied in compelling and nudging behaviors. Compelling behaviors can or should be considered a significant occurrence, in a talent management and employment relations perspective. Among previous examples of managerial compelling behavior, Stahl *et al.* (2002), Suutari and Valimaa (2002) and Pinto *et al.* (2012), using German, Finnish and Portuguese expatriates' samples, respectively, reported cases of employees which have accepted international assignments for developmental motives, though they were also aware of negative consequences in case they refuse it. As also observed in these studies, the compelling behavior is not without consequences. As reported by Pinto *et al.* (2012), pressing employees too hard to take up international assignments may prove to be inadequate, if not detrimental, to the individuals as well as for the employers. Being the recruitment process for an international assignment a key formative event of expatriate psychological contracts, not only does compelling behavior seem to affect the individuals' adjustment and satisfaction, but it may also affect their long-term commitment to the company, and the way the psychological contract is further evaluated (Sherman and Morley, 2018). In addition to this, *disrupted* willingness patterns may foster the risk of downward or loss spirals (Hobfoll *et al.*, 2018), namely in terms of turnover, assignment failure and career derailment, suggesting the need for companies, when dealing with reluctant employees, to evaluate their staffing options beyond functionalist, static or reactive approaches, considering other sources of talent (e.g. e.g. locals and/or self-assigned individuals) and alternative forms of work-related mobility (e.g. business travel, virtual teams, short-term assignments and commuting), often equally effective and more compatible with individuals' interests.

As practical implication, derived from the research findings, willingness (to accept an expatriation assignment) should be considered by companies as asymmetric and one of the



first factors to be addressed by recruitment systems and processes. In the considered cases, it tended to be framed as secondary or was implicitly taken for granted. In addition to this, the observed qualifying role of company policies (as push or pull factor) can be translated in the need to design policies that: (1) maximize incentive effects, (2) purposefully narrow or customize job demands implied by an expatriation setting, taking in consideration individual-level factors (e.g. career stage, domestic employment trajectory, previous international experience) and (3) iteratively increase or modify the job resources base (autonomy, organizational support, job security, mentoring resources and opportunities) made available to expatriate employees. In Portugal, for the considered cases, this can be considered as the key importance, due to the observed heterogeneous company policy scenario, and to the fact that this may help counterbalance or optimize job demands, by replacing (Hobfoll *et al.*, 2018) some resources that expatriates may consider losing – especially those induced by job factors (novelty, ambiguity and conflict) – due to their relocation to a foreign country.

## Conclusions

Typical reasons for expatriation failure include lack or hyphenated motivation to work internationally and cope with larger or different responsibilities, as well as insufficient preparation of future expatriates and ineffective company policies used to identify individuals for available positions. In this context, the present study provides useful evidence to further understand individual-level effects of company expatriate policies, considered as job resources influencing willingness profiles and psychological contracts of expatriates in developing companies and economies.

In the contexts and cases considered by the study, understanding expatriation willingness reveals itself both as critical as hard to accomplish. Supply shortages, selection criteria (preference being given to employees with domestic track records), heterogeneous (ranging from juvenile, functionalist to more dynamic and flow-based) company policies and systems, reactive or lack of *ex ante* planning, portfolio of less attractive host countries being considered (e.g. Morocco, Angola, Mozambique, hills of Peru, Malawi and rural regions of Brazil), make someone's willingness to go abroad a multi-linear equation, increasing the chance of recruitment errors and assignment failure. This should be considered as focus for further empirical studies, namely including low status and self-initiated expatriates, to generate a more grounded understanding of how business expatriates handle asks or opportunities to go or move abroad, and how companies can respond to this by developing, for instance, portfolio-based staffing policies to leverage divergent motives and willingness profiles. This is a particularly sensitive situation, in practical terms, which should be carefully considered by management due to the fact that incumbent business internationalization processes often depend on successful expatriation processes, in addition to the fact that, for an increasing number of individuals, in contexts such as Portugal, maintaining contractual relations and career progression prospects within an employer organization is seen as being conditioned by the acquisition (and display) of international work experience.

The study has limitations that should be considered when interpreting its findings. The design that was coined, based on in-depth interviews, rather than a cross-sectional survey, proved to be quite useful to reveal relationships unexplored before, but precludes the chance to generalize observed findings. In future studies, it's useful to consider a mixed-methods approach, and to increase the number of interviewees, as results can be considered as limited by sample size (24 expatriates). Moreover, the cultural distance between the native country (Portugal) and the destination country was not directly explored. Although this topic did not emerge systematically during the interviews, one should admit that in some cases, where remote, distant or underdeveloped countries and economies are considered, this might have influenced the individuals' willingness to accept the assignment, as recent studies suggest

(Kim and Froese, 2012). Future studies should further explore the relationship established between willingness and psychological contracts of expatriates, and the attractiveness of specific destiny locations at stake.

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