GLOBAL NOMADS: LEARNING FROM EXPATRIATED EXPERIENCE

Angela Geerts
The Val Hammond Series

In 2014, in recognition of Val Hammond’s service to Roffey Park as CEO, Chair and Board member, the Roffey Park Board agreed that part of our surplus in any year should be devoted to our research and thought leadership activities. This provided an opportunity to put into practice and resource an idea that we had been considering for some time. We think that the great work participants produce on our MSc and other qualifications programmes are worthy of a wider audience. For the first time in 2013/14, we worked with an MSc Alumnus, Holly Crane to produce a paper on Behavioural Economics and Coaching. This second adaptation of an MSc dissertation by Angela Geerts on the experience of expatriation we hope will provide some useful insights and stimulate debate on this important and ever more common experience.

Author’s biography

Angela Geerts is an Organisation Development practitioner with 20 years’ experience working primarily in New Zealand but also in Australia and more recently in the UK. In 2011 she and her family moved to Basel, Switzerland, where she took a sabbatical to undertake the Roffey Park MSc in People and Organisational Development. After completing her Masters she returned with her family to New Zealand to join the New Zealand Fire Service as their Organisation Resilience and Development Manager.

Global Nomads: Learning from expatriated experience

Executive Summary

This article provides a summary of research conducted as part of my MSc in People and Organisational Development at Roffey Park Institute. My research included both a literature review of expat learning and a narrative inquiry conducted in partnership with a major international pharmaceutical firm in Basel.

In my literature review I explored research on expat experiences and learning across five different types of expat: company-backed; self-initiated; international volunteers; trailing spouses and third culture kids. Whilst my research did not always reflect the differences in motives and learning across the different expat groups suggested by the research literature, there did appear to be a relationship between expat motives and the nature of learning. The deepest learning appeared to be of a personal nature and aided by reflection – ‘now I am’ rather than ‘now I can’ learning.

Through narrative inquiry I gathered the stories of five expats, focussing on their motives for pursuing an opportunity to be an expat and their learning from it. Four key themes emerged:

- **Intercultural Sensitivity**, the experience of expatriation enhances not only the expats understanding of the host culture but also causes them to re-evaluate their home culture.

- **Learning to be different**, when asking what they learnt from their experience, the expats did not say “now I can” but rather “now I am” indicating how they have changed themselves through experiential learning.

- **Unexpected and unplanned learning**, the learning the expats valued most was not that written in their development plans but rather the learning that emerged through reflection on their experiences. This learning was deep and highly personal involving seeing the world differently and becoming easier with ambiguity, uncertainty and complexity.

- **The value of reflection** to understand and enhance the expat experience.

Based on both the literature review and my narrative inquiry I have identified two ways that we could better support expats to learn from their experience: providing support pre-experience to explore and understand motives and; during the experience creating opportunities to reflect on and make sense of the experience, extracting learning from it.

People who have international experience (excluding holidays abroad) are better problem solvers and display more creativity. They are also more likely to create new businesses and products and be promoted. Increased duration of time abroad increases chance of solving problems requiring creative thinking. This effect was even more pronounced when subjects had made an effort to adapt to their host countries.

(Maddux, Galinsky & Tadmor, 2010, p. 24)
Background – my story

In 2011 my husband and I decided to relocate our family and pursue a new adventure as expats in Switzerland. He was offered a position in Basel and I wanted to return to university to deepen my knowledge of the field of Organisation Development (OD).

My husband and I were both immigrants to New Zealand and we wanted to show our children their European heritage. We wanted them to experience living in a foreign land not just go there on holiday, and to learn from that experience. I saw developmental benefits for the children of bilingualism and cultural adaptability. I hoped they would become more tolerant of, and perhaps even appreciative of, difference.

I expected that the experience of being an expat in Basel would be challenging. We didn’t speak German and we had never even visited the country or city we were moving to. The youth and informality of Kiwi culture is very different to the depth of history, ritual and formality contained in Swiss culture. But I had not expected that I would find it as difficult as I did to change myself and to support my children to adapt to our new environment.

These difficulties made me question our decision. Was it the right one for us? I also questioned why expatriation has become so common and wondered for what purposes do people choose to be expats? And what helps them persevere when the going gets tough? And what do they learn from the experience?

I decided to use my own context as an expat as the focus of my research and dissertation in my work towards an MSc in People and Organisation Development at Roffey Park Institute. I sought to discover more about what people learn and how they develop through the expat experience, because to me learning and development is what makes experience worthwhile.

Research review

What is expatriation? McNulty & Inkson (2013) simply describe an expat as “an employee of an organisation who voluntarily chooses to be sent from their country of origin and/or permanent residence to a foreign country to work temporarily but does not take up citizenship of that country”. (Kindle EBook. 4533) For the purposes of my research I took a broader view and included self-initiated expats, international volunteers, trailing spouses and third culture kids alongside these company-backed expats. Table 1 below provides a description of each of these different types of expat.

Table 1 – A description of different types of expat

<table>
<thead>
<tr>
<th>Expat Group</th>
<th>Description</th>
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<tr>
<td>Company-backed</td>
<td>Traditionally this group includes employees who experience expatriation as ‘there and back’ international postings, often as part of their organisationally managed career (Bonache, Brewster and Suutari, 2001). Modern company-backed expats are more likely to have a ‘there and there’ experience managing their own career and relocation of family from host location to host location.</td>
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<td>Self-initiated</td>
<td>This group initiates their own international experience, often shifting companies with their international move.</td>
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<td>International volunteer</td>
<td>This group offers their specialist skills to developing countries usually at a reduced rate of compensation compared to potential earnings in their home countries.</td>
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<tr>
<td>Trailing spouse</td>
<td>This is the expat’s partner. They do not generally initiate the move. Corporates often see this person as a problem to be solved as many expat failures are attributed to the trailing spouse’s inability or unwillingness to adapt to a new country or culture.</td>
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<td>Third culture kids</td>
<td>‘Children who spend a significant portion of their developmental years outside their parents culture’ (Pollack and Redkin, 2009). Their experience growing up in a second culture has great potential to develop early skills in adapting to new environments, abilities to integrate with and understand new cultures rapidly, and to be more mobile and cope very well with change.</td>
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According to researchers (MCNulty & Inkson (2013) and Mirbava & Michailova (2004) and Hocking et al (2007)), modern expatriation is driven by the need to source and develop scarce skills for immediate tasks and the development of global leadership. It is often identified in OD circles as one of the more effective ways to develop global leadership capability especially in an organisation’s top talent. Other researchers (Stahl et al (2009) and Bonache & Brewster (2001)) have found that organisations expect their expats to improve their ability to communicate across cultures, lead informally across boundaries and better manage in complexity and ambiguity; all talents much in demand (for example, recent research by Roffey Park has looked at the increasing demand for the ability for leaders to work effectively in matrix structures (Wellbelove, J (2015) ‘Living in a Matrix’). Organisations may also use expat assignments to improve global awareness and improve relations between local offices and the ‘Centre’.

The recent increases in demand for expats has also led to different expat arrangements such as recruiting self-initiated expats as home or third country local hires. Modern expatriation also has a stronger focus on expats learning from the experience so to improve their ability to lead in a global environment.
What motivates individuals to be/become expats?

According to the literature expat motives tend to be different across the five different expat groups.

1. **Company-backed expats** express "the opportunity to acquire career capital" including both career opportunities and career development as their primary motive. (Doherty et al., 2011, p. 596)

2. **Self-initiated expats** are most likely to be motivated by the opportunity for personal development and express a desire to experience something new, to be adventurous. (Doherty et al., 2011; Hudson and Inkson, 2006; and Biemann and Andresen, 2010)

3. **International volunteers** have a broader range of motives than their business counterparts. The top 8 identified by Hudson and Inkson are: the right time; altruism; experience culture; search for meaning; challenge; adventure; long held dream; and career change. (2006, p. 31)

4. **Trailing spouse motives** have not been identified in the literature. But from my conversations with trailing spouses, both within my research assignment and socially, their motives seem to me to be very similar to those of self-initiated expats. This is a gap in the available research.

5. **Third Culture kids**. It is an interesting question to consider the child’s expatriation motives. Logically parents make the decisions about where the family lives and therefore the child’s motives may seem irrelevant. However, I have heard many stories of children refusing to relocate with the parents and instead moving in with extended family members in their home country. One of my adult narrators was previously a third culture kid. His motive was related to learning culture and experiencing new adventures. I believe the motives of the children involved in the experience do have relevance for the whole family’s experience. This was exemplified by the comment of one parent who described the impact his 3-year old had on their family’s transition when she expressed her dissatisfaction with their decision by regularly stating “she wished she was dead” during the first 6 months of their relocation.

What do expats learn from their experience?

Implicit in most of these studies (studies of expatriation) is that expatriates learn experientially, through the greater autonomy, responsibility and variety that International Assignments tend to provide (e.g. Oddou and Mendenhall 1991), or through the changes required when adjusting to a new culture (e.g. Black and Mendenhall 1991; Osland 2000). (2011, p. 531)

What do people learn from the experience of expatriation? Again according to the literature typically learning is different for the different expat groups.

1. **Company-backed expats** learn job specific technical skills such as business relations and network development, knowledge of corporate culture and policies and staff training skills. (Hocking et al., 2007)

2. **Self-initiated expats** development themes tend to have more of a focus on soft skills and personal attributes such as flexibility, adaptability, cross cultural awareness and self-confidence. (Doherty et al., 2011; Hudson and Inkson, 2006; and Biemann and Andresen, 2010)

3. **International volunteers** learn both business specific technical skills and soft skills related to personal development. Fee and Gray (2011) liken expat volunteering to high altitude training for athletes.

4. **Trailing spouse development** has not been a topic of research however there are some hints in recent studies that a successful spouse adjustment process involves the development of new self-identity and valuing themselves in their new context is key. (McNulty 2012; and Cole 2011)

5. **Third Culture kids** learn to see Scholes’s culture iceberg upside down – they see the hidden elements of values and beliefs and learn to adapt their own to fit. (Pollack and Van Reken 2009)

What I noticed in my literature review was there seems to be a connection implied in the research literature between motives and the nature of expat learning. Table 2 below summarises this link.

<table>
<thead>
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<th>Table 2: Learning from expat experiences by expat type and motives</th>
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<td><strong>Expat Group</strong></td>
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My research enquiry

I worked with a large multinational firm gathering expat stories in a collaborative approach to narrative inquiry. Narrative inquiry is based on the assumptions "that people by nature lead storied lives and tell stories of those lives, and that these stories can be collected, and used by researchers to write descriptive narratives of experience" (Clanadinin & Connelly, 1990, p. 2). Narrative researchers also believe that stories illustrate more than the events they describe and may also illuminate elements of self described identity and experience that is interpreted through that construction or sense of self.

The study of narrative is the study of the ways humans experience the world. (Clanadinin & Connelly, 1990, p. 2)

I gathered five rich expressions of peoples’ experience as expats with a particular focus on their motives, hopes and dreams underlying their decision to expatriate. The stories also narrated their perceptions of their own learning through, during and perhaps because of this extraordinary experience. In addition I held one rich expression of my own experience.

Having noticed in my literature review that there seems to be a connection between motives and learning I was interested in exploring further the motives and learning expressed within my narrator’s stories. Although I was working with a large international firm my narrators were not all company backed. Stories I heard illustrated a broad range of experience and learning and development. I was not expecting to find common themes across such a small and varied group. But there were some clear similarities of learning across the following four themes:

• Intercultural sensitivity
• Learning to be different
• Unexpected and unplanned learning
• The value of reflection

Intercultural sensitivity

The exposure to another culture for my narrators increased their sensitivity to both the new cultural experience and to their home culture. They expressed a need to recognise and adapt to the culture they were now living in.

“I was amazed because in my onboarding I get the agenda and I could see meetings of half an hour which in Italy could never work, in half an hour you just have a chat, and get a coffee. Whereas here you are in the meeting 2 minutes before you sit down and discuss what you have to discuss and then you leave. But now I have found it depends who you are talking to, some people you can just talk business and some people are a little bit more open to an informal chat. So I adapt to my colleagues effectively, when I understand that they don’t appreciate that then I just don’t do it.” Narrator 2

Expat motives

These expats expressed a range of motivations. Somewhat surprisingly these did not always fit with their “expat group” as I would have expected from the research literature (see table 2 above).

One trailing spouse expressed it as “the time being right and being ready for something new at work and we both found it here”. Narrator 2

One company-backed expat said “it was important for my career especially as the only woman in senior management”. Narrator 3

Another identified it as an overdue, difficult and joint decision with his wife, who gave up her career because they were seeking to give their children a “horizontal education”. He said, “I think the job is actually the least important, particularly when you are moving a family, even though it is the reason you are moving. A lot of the hopes and expectations were around giving the kids a different education, more of a horizontal education than a vertical education. Exposing them to different cultures, exposing them … to different places and to different learning opportunities. All done with them in mind really.” Narrator 1

Narrator 4 who was a self initiated expat said he didn’t know another life. He had been an expat since his first student exchange programme and he loved learning new cultures and he was motivated to learn more and develop his cultural adaptability.

Narrator 5 who was also self-initiated said he had waited until the children had grown because he did not want to interrupt their education and that they were “looking for an adventure and his wife was very open to it”.

The motives of these people were not simple, their decision-making was not easy and they gave me a sense that they were balancing family and career in their decision process. For example, one narrator told the story of how difficult the decision was in a dual career family.

“The company my wife was working for put her on the advanced management development programme and on this programme they move around to different countries, like Australia, and Germany. 18 months in different countries and so that was tough at the time because when I heard she got offered the opportunity I said well take it, and she said I can’t you have done so much in your job. So I got some opportunities and I didn’t (take them) and she got some and she didn’t, (take them) so we were both looking out for each other more than ourselves if you can understand what I mean …” Narrator 1

Everybody’s sense of balance was different, but for all my narrators their sense of what balance was, shaped their decisions.

What did my narrators learn?

The stories I heard illustrated a broad range of experience and learning and development. I was not expecting to find common themes across such a small and varied group. But there were some clear similarities of learning across the following four themes:

I gathered five rich expressions of peoples’ experience as expats with a particular focus on their motives, hopes and dreams underlying their decision to expatriate. The stories also narrated their perceptions of their own learning through, during and perhaps because of this extraordinary experience. In addition I held one rich expression of my own experience.

Having noticed in my literature review that there seems to be a connection between motives and learning I was interested in exploring further the motives and learning expressed within my narrator’s stories. Although I was working with a large international firm my narrators were not all company backed.

Across this group two were company-backed, two were self-initiated, two were trailing spouses, and none were volunteers.

The stories I heard illustrated a broad range of experience and learning and development. I was not expecting to find common themes across such a small and varied group. But there were some clear similarities of learning across the following four themes:

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Intercultural sensitivity

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Narrator 1

“Horizontal education”

Narrator 1

Narrator 4

Narrator 5

Narrator 2

Narrator 3

Narrator 1

Narrator 1

Narrator 4

Narrator 5

Narrator 4

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Narrator 1
They also mentioned noticing things about their home culture that they would never have seen before, for example:

“From here I am looking back where I come from and I see stuff that I was not able to realise before and I think, why are you doing that stupid stuff? It is now so clear we should do it a different way, radically different, I wouldn’t have seen that 6 months ago.” Narrator 3

I have also learned to see my past through new eyes and to question my cultural norms. For example previously there seemed to be only one correct way to raise and educate my children. This has now become one way amongst many options. I have learned to pause and reflect and to let go of the things I cannot control, to be more receptive to new cultural norms and daily routines and to do all this in a second language. Learning this language actually helped with this adjustment because I noticed that language and grammar gave me hints as to different thought patterns and to what was important to others.

Learning to be different

What I found through my inquiry was not that people learned how to do x, y and z skills but rather they learned to be different. In telling the story about their biggest learning they did not say “now I can” but rather they said “now I am”. For example:

“It is not a specific skill and it is not a tangible thing that you can say I know now how to do blah, its more like the way I think about the world is different.” Narrator 4

and

“I am much more open to different experiences. And more understanding of different situations. I am calmer, more relaxed and more self-assured. I am a better listener and less competitive.” Narrator 1

and

“I notice I am more open to trying different things, and I am more open to understanding of other cultures. Once you start doing a role like this you see the world from a different perspective” Narrator 5

From my own experience, I have learned what it is to be the ones who are different and I have become different from the experience in ways I find difficult to describe.

Unexpected and unplanned Learning

Unlike the research literature, which implied that different expat groups typically described different learning outcomes, the stories of learning from the group of expats I spoke with did not always fit the pattern expected. This could be further support for the idea of a link between motives and learning as their motives also did not fit the box.

During their reflections with me the narrators expressed surprise at what they had learned that was not in their formal expat development plan. This unplanned learning tended to be more personal and highly valued.

“I was learning German and running meetings in German and sometimes by the time I understood the problem the conversation had moved on, and I couldn’t just say my first thoughts. So it actually taught me to be a really, really good listener. And for that I am very grateful actually.” Narrator 3

and

“I wanted to develop in specific areas. I was short on some technical skills such as finance, supply chain, but I found that the bigger learning was the soft side of leading a big business, from dealing with challenging business problems to building trust with staff” Narrator 5

The value of reflection

The act of reflection strengthens and deepens learning. Just telling their stories stimulated learning and recognition of learning in all the narrators, and they recognised this too.

“I now realise that I have not just been globetrotting around but I have gained some valuable leadership experience. I feel I have a better sense of where I can apply these learned skills.” Narrator 4

What have I learnt in conducting my research and dissertation?

Expatriation is a common tactic used by organisations to develop global leadership capability as well as meeting operational needs where the right resources are scarce in local operations. Despite its popularity, some commentators/research suggest that a quarter of such assignments fail. My research on others’ experiences combined with my own experience has revealed the variety of motives that individuals have for embarking on an expat experience and how those motives can shape learning, potentially in areas that an organisation sponsoring an assignment had not intended to invest in.

From my own work, it seems that the deepest learning is of a personal nature aided by reflection – ‘now I am’ rather than ‘now I can’ learning. It seems to me that individuals embarking on an expat experience who are not geared up for, and supported by their organisation, in this type of learning may not only be missing a wonderful opportunity for learning, but may also be less well prepared and more likely to fail in their assignments.

What can we do to support expats?

There are two simple supports we can provide to expats before and during their expat experience. The first is to help expats understand their own motives and the influence their motives could have on their learning. The second is to create opportunities for regular reflective practice, for example by setting up peer to peer coaching for expats or action-reflection learning groups.

Expats can also support and enhance their own learning and adaptation by taking a little time before becoming an expat to consider their own big “why’s”, what is their purpose in this experience? They could deepen their learning during the experience by learning to practice critical self-reflection as a life skill, or by engaging a learning coach to support this practice.


