# A META-NARRATIVE ANALYSIS OF THE MOBILITY EXPERIENCES OF EXPATRIATE ACADEMICS

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─**Abstract**─
The purpose of this paper is to review existing studies in self-initiated expatriate management and academic mobility literature, with a specific focus on expatriate academics as their target population. Key themes were identified using an extensive literature review and to contextualise the study undertaken within the current body of knowledge. This study uses a meta-narrative approach to literature, to review, critique and express what the literature says about expatriate academics. An unobtrusive research technique, namely documentary analysis, is used to analyse literature. Analysis revealed the following themes: motivations for expatriation, aspects of adjustment (social, cultural and work) and academic mobility trends. The directions for future research, recommendations to university management, as well as the limitations of these studies were also presented. This paper articulated key concepts about expatriate academics, including how the motivation to expatriate, as well as adjustment and attitude to the new environment following expatriation, may affect work-related outcomes. Finally, it provided future areas of research, recommendations to university managers as well as limitations of the studies analysed.

## 1. INTRODUCTION

A 2019 report by the United Nations Department of Economic and Social Affairs Population Division estimated that there were nearly 272 million people participating in international mobility.  This figure signified 3.5% of the total world population in 2019 (United Nations: Department of Economic and Social Affairs, 2019).  This mass mobilisation consists of asylum seekers and refugees as

well as migrants who move for work, this group of people make up 2% of the total number of mobile people. A self- initiated expatriate (SIE) refers to a person who has chosen to leave their home country to live or work in another country for a lengthy period of time, rather than being sent by their company or one who is "less organisationally directed and more individually directed" (Alshammari, 2013:17). The SIEs studied in management literature are those occupying top management, executive and middle management positions. The term expatriate academic emerged from early debates around SIEs and are defined " a member of the higher education sector who has moved their dominant place of residence across national borders to take up legal, long-term, yet time-bound, employment in a teaching or research-related role within a university environment" (Trembath, 2016:115). This paper has two goals, namely, to provide a comprehensive review of existing literature and to identify the gaps in this relatively under-researched body of knowledge over a ten-year period.

## 2. METHODOLOGY

This study uses a meta-narrative approach to literature, in order to review, critique and express what the literature says about expatriate academics. An unobtrusive research technique, namely documentary analysis is used to analyse literature. In the section below, an overview of the studies done from 2009-2019 using expatriate academics as their target population has been done, in order to identify the areas of focus covered by these studies.

## 3. A REVIEW OF STUDIES ON EXPATRIATE ACADEMICS 2009-2019

Table 1 provides an overview of studies on self-initiated expatriates (SIEs) and international human resource management literature that have focused on expatriate academics as their target population from 2009-2019, revealed that the majority of studies focused on expatriate academics from four major regions. These were:

- The Middle East- Saudi Arabia, Qatar, Dubai,Turkey
- The Oceania region- South Korea, Malaysia, Singapore
- The Southern African region- South Africa
- Nordic region: Sweden, Finland, Denmark, Iceland, Norway and the Netherlands

When comparing the empirical research done, studies ranged from large scale multi-country studies, with large sample sizes using online survey instruments, to small scale studies at a single institution in a single country using self-

administered questionnaires or interviews. Non-empirical research, ranged from national and institutional audits run by the quality assurance bodies of higher education in South Africa that examined academic mobility trends in South Africa. The following themes were identified in terms of the aspects covered by these studies:

- Motivation- decision to expatriate/decision to remain/decision to leave
- Adjustment- social/cultural and work
- Academic mobility patterns and immigration trends

The next sections will provide an analysis and discussion of the findings of this process. Thereafter the limitations and directions for future research will be described.

## 3.1 Motives for Expatriation

An incumbent's motivation to join an institution is vital in understanding how best to retain them in an organisation. Richardson and McKenna (2002) and Richardson (2009) had laid the foundation for work on this subject. Richardson and Mckenna (2002) broadly described four categories of motives using 'metaphors'. An *explorer* is someone who is on a journey of self-discovery, while a r*efugee* is someone motivated by a search for a better quality of life either personally or professionally. A *mercenary* is someone who explicitly chases 'monetary rewards' above all else, and lastly an *architect* is someone who is trying to improve their marketability by engaging in career building. A regional analysis of the motives of expatriate academics has been presented below.

## 3.1.1 Middle East Region

Romanowski and Nasser (2015) found that regimes like the United Arab Emirates (UAE) imposed strict regulations on the academic environment, thus severely

Table 1: An overview of the studies done on expatriate academics in management literature 2009-2019

| No | Author/s | Title | Themes covered | Sample of Expatriate Academics | Methodology |
|---|---|---|---|---|---|
| 1 | Richardson, J. (2009) | Geographic Flexibility in Academia: A cautionary note. | Opportunity to expatriate, decision to expatriate, expatriation experience | 30 British respondents working in several different countries abroad | Qualitative: in-depth interviews |
| 2 | Henha, N,P. (2009) | Analysis of the perceptions of expatriate academics on the factors affecting their work performance | Biographical profile, social and cultural adjustment. | 85 respondents working at a metropolitan university in South Africa | Quantitative: Survey |
| 3 | Maharaj, A (2011) | The impact of globalisation on South African higher education institutions: Patterns of academic inflow into the South African higher education system | Inflows of Expatriate academics into South African higher education system | Respondents working in South African higher education institutions in 2010. | Secondary data collection/records/reports |
| 4 | Froese, F.J. (2012) | Motivation and Adjustment of self-initiated Expatriates: The case of Expatriate academics in South Korea | Motivation to relocate, adjustment to host country and work environment. | 30 respondents in South Korea | Qualitative method: in-depth interviews |
| 5 | Selmer, J. and Lauring, J. (2012) | Reasons to expatriate and work outcomes of self-initiated expatriates | Reasons to expatriate, Work outcomes | 428 respondents working in Nordic Countries and the Netherlands. | Quantitative Method: Questionnaire |
| 6 | Parnia ,A.; Hosseini, N. and Fen W.S. (2013) | Adjustment, Motivation for Retention and Environmental Similarity toward Satisfaction | Adjustment, Motivation, Environmental similarity and its impact on | 30 respondents working at a single university in | Quantitative method: questionnaire |

| | | among Expatriate Academics | Satisfaction | Malaysia | |
|---|---|---|---|---|---|
| 7 | Alshammari, H. (2013) | The Adjustment of Expatriate Academics in Higher Education Institutions in Saudi Arabia | Cultural distance, previous work experience and demographics on adjustment | 237 respondents working at two universities in Saudi Arabia. | Quantitative study: Online questionnaire |
| 8 | Maharaj, A. (2014) | Expatriate Academics And Expatriate Management In A South African Higher Education Institution | Motivation, social, cultural and work adjustment, Managing expatriate academics | 83 respondents working at a metropolitan university in South Africa | Mixed methods: Audit, Questionnaire, Semi-structured Interviews |
| 9 | Austin, A.E.; Chapman,D.W. ; Farah, S.; Wilson, E. and Ridge,N. (2014) | Expatriate Academic staff in the United Arab Emirates: the nature of their work experiences in higher education institutions. | Defining aspects of the work experience of expatriate faculty in the UAE. | 29 respondents at UAE universities | Qualitative Study: In-depth interviews |
| 10 | Halima, H.;Bakara, H.A.; Mohamada, B.(2014) | Expatriate Adjustment: Validating Multicultural Personality Trait among Self-initiated Academic Expatriates | Multicultural Personality Questionnaire (MPQ) and the relationship with expatriate's personal, professional and social adjustment. | 101 respondents working at a university in Malaysia | Quantitative Method: online questionnaire |
| 11 | Romanoskwi, M.H. and Nasser, R. (2015) | Identity issues: expatriate professors teaching and researching in Qatar | Conflicts faced by expatriate professors in teaching and research and its impact on their identities | 20 respondents in public and private universities in Qatar | Qualitative Method- In-depth interviews |
| 12 | Abeeba, I.; Muenjohn, N and As-Saber, S. (2015) | Self-Initiated Expatriate Academics (SIEAs) in the Malaysian Higher Education Sector: Instruments Development and Preliminary | Expatriation issues, job satisfaction, organisational commitment, cultural intelligence and emotional | Instrument design: SIEAs Expatriation Issues Survey (SEIS) | Quantitative Method: Questionnaire development |

| | | Results | intelligence. | | |
|---|---|---|---|---|---|
| 13 | Maharaj, A. (2016a) | Strangers amongst us: Expatriate Academics in South African Higher Education | Examine the academic mobility trends at UKZN and to look at the opportunities they bring to managers. | Respondents working at one metropolitan university in South Africa, 2005/2010/2012 | Mixed methods: Secondary data collection and interviews |
| 14 | Maharaj, A. (2016b) | Academic Mobility and Immigration Trends in South African Higher Education Institutions | National Inflows of Expatriate academics into a South African higher education institutions | National academic mobility trends in South Africa 2005/2010/2015 | Secondary data collection/records/reports |
| 15 | Trembath, J.J. (2016) | The Professional Lives of Expatriate Academics | Definitions and themes in expatriate academic literature | Expatriate academic studies | Meta-narrative analysis |
| 16 | Maharaj, A. (2017) | International Career Experiences of Expatriate Academics in South Africa | Examined the career experiences of expatriate academics | 83 respondents at a metropolitan university | Quantitative Methods: Questionnaire |
| 17 | Harry, T, Dodd, N. and Chinyamurindi, W.T. (2017) | Using narratives to understand the motivational factors and experience of being a self-initiated academic expatriate in South Africa | Motivation to expatriate and challenges experienced | 25 respondents at a rural university in South Africa | Unstructured in-depth interviews |
| 18 | Agha-Alikhani,B. (2018) | Adjustment in International Work contexts: Insights from self-initiated expatriates in academia | Adjustment in the work context | 12 respondents in a university in Denmark | Unstructured in-depth interviews |
| 19 | Harry, T.; Chinyamurindi, W.T. and Dodd,N. (2019) | Using Narratives to Understand the Experience of Career Success amongst Self-initiated Expatriates in South Africa | Experience of career success | 25 respondents at a rural university in South Africa | Unstructured in-depth interviews |

limiting academic freedom. These restrictions may lead to academics choosing to leave this environment. While this may be the case, many academics still go to these regionsGulf countries pay amongst the highest salaries in the academia, therefore the primary motivation appears to be *mercenary*.

### 3.1.2 Oceania Region

Froese (2012) examined the motivation of expatriate academics to relocate to South Korea. He found that academics from the Humanities and Social Sciences found themselves in a highly competitive labour market and that securing permanent employment was extremely difficult; therefore, when offered posts in South Korea, they willingly accepted (*architect*). Some academics were primarily motivated by their family support structures who were based there. In contrast, others were driven by poor labour market conditions in their home countries (*refugee*), while others relocated because of they appreciated the culture and customs (*explorer*).

Parniana, Hosseinia and Fena (2013) explored expatriate academics' motivation to remain in their universities in Malaysia, thus making its focus slightly different from the other studies analysed. The majority of respondents stated that the "research opportunities, reputation of the university, research funding, reputation of department, research/ lab facilities, international experience, professional development opportunities" were their motivation to remain (Parniana et al., 2013:126). At the same time other respondents found that the "geographic location of Malaysia, cost of living, everyday customs and general living conditions" their strongest motivation to remain (Parniana et al., 2013:127). These motives could be described using the metaphors developed by Richardson and McKenna (2002), as *architect, explorer and refugee*.

### 3.1.3 Southern African Region

Maharaj's (2014) study at a metropolitan university in South Africa, the 'pursuit of meaningful work' and 'career advancement' were the two most important motivations for academics. Therefore, the metaphor '*architect'* is best suited to describe expatriate academics in this study, as career building is the primary motivation.

Harry, Dodd and Chinyamurindi's (2017:7), study at a rural university in South Africa, found the "desire to access educational opportunities in South Africa as a basis for improvement and the worsening economic and political conditions in the home country" (*refugee*) as one of the main motivators. Furthermore, Harry et al.

(2017) found that 'good facilities' in South African universities allowed academics, especially from the discipline of Science and Engineering to conduct their research and was another highly motivating factor (*architect*). Both Maharaj (2014) and Harry et al. (2017) samples comprised of mainly Black African males from other African countries. Thus, these academics primary motivation for coming to South Africa, was seeking improvement for their professional and personal lives (*refugee*) followed by the desire to build their careers (*architect*).

### 3.1.4 Nordic Region

Selmer and Lauring's (2012) study set in Nordic countries and the Netherlands expanded the work of Richardson and Mckenna (2002) along the lines of 'push and pull' factors. Selmer and Lauring (2012) found that one of the affect-driven motives to expatriate, that is, *refugee* reasons (life change/escape), had a negative influence on work adjustment. They also found that the other affect-driven reason, that is, *explorer* reasons together with cognitive-driven reasons (*architect* and *mercenary*), did not affect the expatriate academics adjustment to their work environment.

### 3.2 Adjustment: Social/Cultural and Work

The ability to perform successfully in a new environment depends mainly on the expatriate academics' ability to become accustomed to living, working and socialising with the local people—a process described as 'adjustment' (Alshammari, 2013). A regional analysis of the social, cultural and work adjustment of expatriate academics has been provided in the section below.

### 3.2.1 Middle East Region

Alshammari (2013) validated Black, Mendenhall and Oddou (1991) expatriate socio-cultural adjustment model, when he found that the greater the cultural distance between the home and host country, the less likely the expatriate academic would successfully adjust to Saudi Arabia. In contrast, Maharaj (2014) found that cultural similarity did not ensure that the academic would successfully adjust in South Africa.

In Qatar, an academic's ethnic identity had to be socially acceptable, and therefore was of a dynamic nature so that if their career advancement or personal safety was threatened they could change how they identified themselves. The academic context was one where a lack of job security severely affected the ability to adjust. Expatriate academics found that there was no academic freedom to develop students or their research according to their own beliefs (Romanowski and Nasser,

2015). Austin, Chapman, Farah,Wilson and Ridge (2014:545) examined "defining aspects of the work experience of expatriate faculty in the United Arab Emirates". Austin et al. (2014) found that teaching took up the most time, while research was an afterthought, mainly due to the time constraints and limited resources available. While research was not a priority, academics engaged in it for their own academic relevance. Romanowski and Nasser (2015) also supported these findings.

### 3.2.2 Oceania Region

Froese (2012) found that expatriate academics who were more receptive to the local culture and customs (*explorer*) led to increased job adjustment, while those who were trying to improve their personal or professional circumstances (*refugee*) led to reduced work adjustment. Halim, Abu Baker and Mohamad, (2014:127) looked at the adjustment of self-initiated academic expatriates working a public university in Malaysia, where they investigated the relationship between "Multicultural Personality Questionnaire (MPQ) and the expatriate's personal, professional and social adjustment". Results indicated that having emotional stability, flexibility, and local peer support positively influenced the expatriates' ability to adjust. On the contrary, Maharaj (2017; 2014) found that expatriate academics did not enjoy much assistance from their peers in the university (work) or their communities (social). Curiously enough, both samples consisted of respondents from culturally similar countries, yet their experiences in terms of assistance were vastly different.

Parniana et al. (2013:123) investigated the "level of motivation, adjustment and environmental similarities among expatriate academics in a Malaysian university". They found that academics were able to better adjust to their work environment, rather than their cultural and social environment. Furthermore, when Parniana et al. (2013) looked at the motivation to leave, they found that the main reason was the language barrier that made it difficult to find job opportunities for foreigners, especially for spouses not in the academic environment. Children's schooling also became an issue as it was difficult to find a good quality English school, as most schools were taught in the Malay language. Similarly, language played a critical role in Maharaj (2017; 2014) studies, where expatriate academics and their families were ostracized for not being able to speak the local dialect, IsiZulu.

### 3.2.3 Southern African Region

Henha (2009) found that effective performance depended on local language efficiency, as this led to increased satisfaction, enhanced work performance and decreased staff turnover. She found a positive relationship between language and work performance, social and cultural adjustment. Moreover, the number of years worked at the university as well as the job category of the academic had an impact on the relationship between organisational socialisation and work performance. Academics who were satisfied with the level of organisational support received were more likely to be well adjusted, while those who did not have good relationships with colleagues and locals alike were not (Henha, 2009).

Maharaj (2017) found that the majority of expatriate academics were well adjusted in terms of their relationships with their host country colleagues, family and friends back home as well as in terms of the fulfilment of their workplace expectations. It was found that they did not share close ties with other expatriates, local South African colleagues or in their communities. This can be attributed in part to the xenophobic attitudes faced by foreigners in South Africa.

Harry et al. (2019;2017) examined the experiences of expatriate academics at a rural university in South Africa and found long working hours, discrepancies in terms of effort versus remuneration, and discrimination from local and community members as part of the challenges faced. These challenges were similar to those experienced by expatriate academics in other parts of the world (Romanowski and Nasser, 2015; Halim et al., 2014; Austin et al., 2014; Parniana et al., 2013; Alshammari, 2013).

### 3.2.4 Nordic Region

Agha-Alikhani (2018) examined how expatriate academics adjusted to work in Denmark. Unlike in other workplaces where the ability to speak the local language is a critical tool in successful adjustment, Danish academics valued English as a 'corporate language' over the local dialect, as English is the medium for teaching and research. Furthermore, Agha-Alikhani (2018) found that within this academic context, interactions with local academics were not a priority as a sense of belonging to the 'global village' took precedence and was crucial in the accessibility of essential support resources.

Selmer and Lauring (2011) found that the degree of workplace adjustment has a significant impact on outcomes such as job satisfaction, organisational commitment and subsequently on performance. Consequently, Selmer and Lauring, (2012) found that job clarity (a clear understanding of what the job

entails) may affect not only adjustment but also effectiveness, performance, job satisfaction and level of competence. Furthermore, they found that resilience had a potential impact on job adjustment.

## 3.3 Academic Mobility and Immigration trends

Maharaj (2016a, 2016b, 2014, 2011) investigated the demographics of expatriate academics that were recruited nationally and at a metropolitan university in South Africa. An examination of the current academic landscape in South Africa compared the profile of South African (SA) academics to expatriate academics, using the 2005/2010/2014 data provided by the Higher Education Management Information Systems (HEMIS) of SA. The Department of Higher Education and Training, as well as SA universities, had advocated running programmes in Science, Engineering and Agriculture disciplines through the recruitment of expatriate academics (Maharaj, 2016b; 2011).

The results revealed that while age was not a significant variable nationally, more expatriate academics held doctoral degrees than their SA colleagues (Maharaj, 2016b). The majority of expatriate academics were recruited from SADC countries as well as other African countries (Maharaj, 2016b). The University of the Witwatersrand (WITS) followed by the University of Cape Town (UCT) were consistently ranked first and second for the number of expatriate academics employed over the three years. Both remain amongst the leading five higher education institutions in South Africa in terms of their research outputs as well as the number of doctorates per member of staff (Maharaj, 2016b; 2011).

## 4. FUTURE RESEARCH

This section provides an overview of the identified gaps in the existing body of literature. A summary of these gaps includes firstly, the need to recognise the importance of social support and social network interaction when investigating international career experiences (Agha-Alikani, 2018; Romanowski and Nasser, 2014; Austin et al.,2014; and Alshammari, 2013). Secondly, Maharaj (2017) and Trembath (2016) suggest the need to investigate demographic and psychographic characteristics in terms of nationality, gender and ethnicity. Thirdly, the need for a comprehensive appreciation of the motivation of expatriate academics to leave their home country in order for policy makers and HR managers to be better equipped to handle the employment issues that may arise (Maharaj, 2017; Trembath, 2016; Maharaj, 2014). Finally, the need for national studies that incorporate all the universities of higher education in a particular country, where a

bigger sample of expatriate academics from different countries would improve the generalizability of the research findings (Aga-Alikhani, 2018; Harry et al., 2017; Halim et al. 2014; Maharaj, 2014; Austin et al., 2014).

## 5. RECOMMENDATIONS FOR UNIVERSITY MANAGEMENT

This section contains a summary of the recommendations provided to university managers in the studies analysed. Firstly, universities seeking internationalisation should recognise the international experience of all employees, either in the form of remuneration or by tapping into social networks and resources (Romanowski and Nasser, 2014; Alshammari, 2013). Secondly, On-boarding and induction programmes incorporating language and cultural awareness training designed specifically for new international faculty (Agha-Alikhani, 2018; Austin et al., 2014; Selmer and Lauring, 2013). Finally, university management needs to provide realistic previews of what to expect in terms of work and socio-cultural context to academics before they accept a position with the university to avoid a 'culture shock' when they get to the host country (Trembath, 2016; Maharaj, 2014; Richardson, 2009).

## 6. LIMITATIONS

Although every effort has been made to ensure rigour in this review, there are nonetheless several limitations. Firstly, the majority of qualitative studies cited non-generalisability of their findings as a critical limitation; this was due to the small sample size and or the adopted methodology (Agha-Alkhani, 2018; Halima et al. 2014; Austin et al. 2014; Alshammari, 2013; Parniana et al. 2013). Secondly, studies by Maharaj (2017, 2014) and Harry et al. (2017, 2019) consisted of samples of a majority of Black African males, this unpredicted consequence could have skewed the results of the studies, however, and ethnicity and gender were not fully explored. Thirdly, studies by Henha (2009); Selmer and Lauring (2012); Austin et al. (2014); Abeeba et al. (2015) focused only on work/professional lives of EA's and ignored the non-work aspects. Finally, all the studies in this paper focused on English language publications, which may have skewed the results.

## 7. CONCLUSION

This paper sought to critically analyse the studies using expatriate academics as their sample for the period 2009-2019. In total, 19 studies were examined and discussed. Using document analysis, it extracted themes emerging from these studies these included: The motivation to expatriate, the adjustment (social, work and cultural) to the host country, as well as academic mobility and immigration

trends. Furthermore, a summary of the directions for future research and recommendations to university management have been presented, and finally, an overview of the limitations of the studies reviewed has been presented. Thus, the two goals of the paper, to provide a comprehensive review of existing literature and to identify the gaps in this relatively under-researched body of knowledge over a ten-year period have been achieved.

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