Balancing individual and organizational goals in global talent management: A mutual-benefits perspective

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ABSTRACT

Drawing from the talent management and global mobility literatures, there is simultaneous pressure to address both organizational goals to place talent internationally, and individual goals of self-initiated expatriation. This raises important questions for the future of global talent management (GTM): how might individual and organizational goals be balanced to the mutual benefit of both parties? Qualitative data from pilot studies in multinational corporations demonstrate a largely financially driven balancing act between self-initiated and organization-assigned expatriate assignments. Building primarily from psychological contract theory, this study builds propositions for future research, and explores the implications for global talent management practice.

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1. Introduction

In today's global economy, multinational corporations (MNCs) are increasingly reliant on their ability to manage their international operations effectively, realizing the need to develop key talent into future leaders (Mendenhall, Reiche, Bird, & Osland, 2012). As such, MNCs develop global talent management (GTM) strategies, concentrating on the movement of talent around the organization through expatriate assignments (McDonnell, Scullion, & Lavelle, 2013). This not only enables the company to perform services in the global market (Neal & Cavallaro, 2007), but also serves as a tool for developing managers with the global competencies and mindset to lead the MNCs of the future (Javidan, Teagarden, & Bowen, 2010).

As a result, GTM has emerged as a field of study from the strategic international human resource management and talent management literatures (Tarique & Schuler, 2010). Despite the growing awareness of the importance of effective GTM to the success of global operations (Tarique & Schuler, 2010), MNCs face

considerable challenges in implementing their GTM strategies (McDonnell, Lamare, Gunnigle, & Lavelle, 2010; Scullion & Collings, 2011). This article explores GTM strategies, focusing on how organizational-level talent management policy is balanced against individual-level motives for expatriation assignments. While the advantages of GTM to the organization are apparent, expatriation assignments potentially also provide a unique opportunity for the individual, setting him or her on a path of career development with global mobility opportunities (Baruch, Dickmann, Altman, & Bournois, 2013).

The approach to GTM taken in MNCs is driven by a range of organizational goals, including business control and client demands, moderated by cost considerations (Li & Scullion, 2010; Suutari & Brewster, 2001). From the individual employee's perspective, there is an equal but different variety of goals, extending from personal and career development, to a desire to follow family members to another country or a longing to experience the challenges of working overseas (Andresen, Biemann, & Pattie, 2013). The aim of this study is to explore how these two sets of goals might be balanced in what we term a 'mutual-benefits approach' to GTM. In doing so, we reconcile two emergent bodies of literature: whilst the growing body of GTM literature focuses on leveraging internal talent to address organizational goals, it pays little attention specifically to expatriation assignments, which has emerged as an independent (though related) field of study on global mobility. Observations from two pilot qualitative studies are set against psychological

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contract theory in order to understand the implications for GTM strategy and to identify important research questions, resulting in the development of propositions for future research and practice in this field.

2. Contrasting organization-assigned versus self-initiated expatriation goals and challenges

The talent management literature defines GTM as: "the strategic integration of resourcing and development at the international level that involves the proactive identification, development and strategic deployment of high-performing and high-potential strategic employees on a global scale" Collings and Scullion (2007, p. 102). Concurrently, the global mobility literature focuses on the importance of expatriation assignments for MNCs: addressing a lack of availability of management and technical skills in certain locations; controlling and coordinating operations locally; developing future managers and leaders; and maintaining trust in key foreign businesses, or serving representational purposes (Collings & Scullion, 2012; Li & Scullion, 2010). Additionally, some of the GTM literature highlights the potential importance of expatriation assignments for future business development from a talent perspective: producing leaders who understand the business context and global strategy, and equipping top talent to become future leaders (Gakovic & Yardley, 2007); ensuring future leaders have competencies to handle globally spread operations (McDonnell et al., 2010); helping assignees and the receiving country understand the networks that will provide the assignee with the connectivity to build architectural knowledge around the business model (Sparrow, 2012); and building a diverse, high-performing business team to drive innovation and growth (Neal & Cavallaro, 2007).

Despite these obvious benefits of expatriation, a major issue facing MNCs is expatriation's high cost (Suutari & Brewster, 2001). In addition to the already substantial direct costs of the initial expatriation, should the assignment fail (due to a range of issues, including family difficulties and cultural adjustment, well-documented in the global mobility literature), there are indirect costs due to failure in the local business (Harzing, 1995; Harvey & Moeller, 2009). These high costs are particularly associated with the use of traditional, long-term, organization-assigned expatriates (AEs), i.e. employees assigned to go on overseas for a defined period within the organization. To address this, two trends have seen a gradual reduction in the use of AEs in recent years. Firstly, the growing importance of alternative forms of international assignment (for example, short-term, commuter, and international frequent flyers: Collings, McDonnell, Gunnigle, & Lavelle, 2010; Collings, Scullion, & Morley, 2007; Mayrhofer, Reichel, & Sparrow, 2012). Secondly, a rise in the number of self-initiated expatriates (SIEs). These are individuals who relocate voluntarily to a foreign country, without assistance, and are hired under a local, host-country contract (Al Ariss & Crowley-Henry, 2013; Andresen, Al Ariss, & Walther, 2013; Biemann & Andresen, 2010; Vaiman, Scullion, & Collings, 2012).

Significant differences exist however between AEs and SIEs with respect to their motivations for undertaking an overseas assignment and the value to their careers (Andresen, Biemann, et al., 2013). The challenge for policy is to match new sets of organization and individual goals. SIEs are often activists who take control of their own careers in a highly proactive manner and operate with a high degree of personal agency (Altman & Baruch, 2013; Mayrhofer et al., 2012). In the same way that AEs are sent overseas for different reasons, SIEs likewise have different and perhaps a broader set of motivations. These may include personal development, career development, family connections, exploration, seeing other cultures, and escaping from existing ways of living (Cerdin, 2013; Inkson, Arthur, Pringle, & Barry, 1997; Shaffer, Kraimer, Chen, & Bolino, 2012). Personal and professional development is seen as important given diminished job security in many lines of work (Cerdin, 2013; Stahl, Miller, & Tung, 2002). Organizations need to consider SIEs as a special case, partly because they have higher organizational mobility than traditional AEs (Biemann & Andresen, 2010), and because of distinctive GTM challenges that arise when seeking to manage SIEs effectively (Haslberger & Vaiman, 2013; Howe-Walsh & Schyns, 2010).

Both SIEs and AEs are generally willing to overcome the personal hardship of an expatriate assignment, as both groups believe that it will help them get ahead in their career (Jokinen, Brewster, & Suutari, 2008). Nevertheless, many expatriates are not promoted when they return home, at least in the short-term, as rationalization and restructuring makes it hard for MNCs to give expatriates post-assignment employment guarantees (Pate & Scullion, 2010). This creates a disconnect for those successful assignees between their learning about the overseas market and cultural leadership skills and their actual career prospects (Bolino, 2007; Suutari, 2003). This raises questions for the future of expatriation regarding the alignment of goals of both AEs and SIEs, which may be expected to change in line with changed and more realistic expectations of the experience.

Recent research finds that both AEs and SIEs appear to have similar boundaryless career ambitions (Andresen, Biemann, et al., 2013) and similar career anchors (Cerdin, 2013). We might conclude therefore that both AEs and SIEs see expatriation as a potential career-development tool. SIEs also perceive overseas experience as a means of self-development or to achieve personal rather than corporate goals, whereas AEs primarily seek to achieve company goals in order to benefit from the career progression and the increased opportunities that are offered on their return (Andresen, Biemann, et al., 2013). There are therefore multiple and contrasting goals at stake in expatriate assignments.

The extent to which these goals are complementary or competing and can be balanced is a primary focus of this paper. From a theoretical perspective, contingency theory explains the use of expatriation by MNCs: corporate strategy is aimed at growing the business, which, when lead by global clients or new overseas markets, necessitates the movement of key individuals to foreign locations to facilitate this expansion. In other words, this is an 'outside-in' approach, whereby strategic decisions based on the external environment influence corporate actions (Baden-Fuller & Stopford, 1994). Expatriation is a tool used by MNCs to facilitate global expansion and the future growth of the firm, leading to the phenomenon recognized as AEs.

This contingency approach however does not take into consideration the individual perspective, especially for those employees who might not be prepared to limit their ambitions to the sole pursuit of an internal career. For example, increasing numbers of employees, particularly young graduates, are looking for overseas experiences to develop their careers as SIEs (McDonnell, 2011). This employee group may not be the first choice for an MNC to send overseas as an AE due to their lack of experience, which may augment the risk that they may be prepared to switch jobs to another firm to augment their international experience.

An alternative and more fruitful theoretical framework (psychological contract theory) can help to balance the 'outside-in' approach to developing a GTM strategy: there are corporate gains to be had by focusing on the evolving needs of talent inside the organization – in developing an internally driven GTM strategy (an 'inside-out' approach) – rather than relying on external market forces to define this. Meeting individual employee needs is more likely to result in an engaged and productive workforce (Rousseau, Ho, & Greenberg, 2006). This is based on the psychological contract

notion of reciprocity: "the belief that a promise has been made and a consideration offered in exchange for it, binding the parties to some set of reciprocal obligations" (Rousseau, 1989, p. 123).

Focusing on employee needs and the psychological contract means paying greater attention to self-initiated expatriation, which in turn requires increased flexibility in GTM policy in MNCs. SIEs are effectively volunteers, and are a means for organizations to form an international workforce beyond the more common process of assigning employees to transfer between subsidiaries (Fee & Karsaklian, 2013). Alongside consideration of the need to address corporate strategies and individual goals, the internal GTM strategy must be supported by an appropriate set of systems and structures – usually assigned to a human resources (HR) or global mobility (GM) function. Given financial and reputational costs, no firm will just send volunteers on assignments – they still need to match expectations and assess capability. The challenge remains both to move beyond more exclusive and centrally defined talent pools, and to understand the financial implications of volunteer-style assignment and career control mechanisms. In general, firms underestimate the complexities involved here (Suutari & Brewster, 2001), with failure to complete an assignment successfully often being attributed to poor management of the assignees (Scullion & Brewster, 2001).

Largely as a result of cost and co-ordination considerations, MNCs have tended to shift to a more centralized HR/GM function to oversee expatriate assignments (Sparrow, 2012). Centralization and standardization have the advantage of creating 'one-size-fits-all' programs for AEs, reducing costs, and increasing transparency. Alongside this centralization, however, a more nuanced set of policies have also emerged, introducing some necessary flexibility to enable business divisions to customize, and individuals to personalize, the implemented policy. This is due to a variety of factors, such as cultural differences across markets, different types of assignments being undertaken, as well as each expatriate's individual circumstances. Sparrow (2012) notes that, in an attempt to better reconcile the complementary or competing goals of the GTM systems and individual goals, GM functions have been pursuing a three-stage evolution in their philosophy to assignment flexibility: moving from limited exceptions to a globally standardized policy, through more customized flexibility based on a variety of set policy types, and potentially into an individualized approach to flexibility. In other words, there is variance emerging in MNC responses to GTM challenges, demonstrating the need to balance appropriately both standardization and flexibility to achieve GTM goals at both the organization and individual levels.

As we have argued, the shaping of expatriation strategy by MNCs by external market demands, and development of an over-arching GTM strategy on this 'outside-in' basis, can be explained by contingency theory. The broadened population of AEs and SIEs now managed as part of a GTM strategy suggests it is important to extend our frame of reference and incorporate an understanding of individual needs and goals. Career theory shows that the employee segments who now avail themselves of the opportunity for expatriation assignments have more complex and differentiated motivations (Baruch et al., 2013). The way in which GTM systems accomplish the balance between organizational cost and co-ordination considerations and individual career goals creates a new set of promissory signals.

A more useful approach, therefore, is to apply psychological contract theory. This focuses on the need for reciprocity in promises made, and to show the value of building an 'inside-out' approach, i.e. an internally driven mutual benefits GTM strategy. Social exchange theories advocate that relationships exist between individuals to result in the maximization of benefits for each party. Rousseau (1989, p. 123) introduced a more narrow definition of the psychological contract, conceptualizing it at the level of the individual, and as a cognitive-perceptual entity:

"the psychological contract is an individual's belief in the terms and conditions of a reciprocal exchange agreement between the focal person and another party. A psychological contract emerges when one party believes that a promise of future returns has been made, a contribution has been given, and thus, an obligation has been created to provide future benefits".

This perception – driven by a demand to reciprocate – is subjective, differs between individuals; dynamic (changes over time during the relationship between employer and employee); and concerns mutual obligations (a commitment to some future action), based on given promises. It is underwritten by trust that the other party will fairly discharge their obligations. Exchange partners in the relationship will strive for balance and will attempt to restore balance if an imbalance occurs.

Organizations do not have psychological contracts – but their agents do – and the HR/GM policy designers are one set of agents. Both parties (expatriates and policy designers) have beliefs regarding the terms and conditions of a reciprocal exchange agreement between the focal person (expatriates) and another party (the organization, with the HR/GM function having to design policy in ways that ensure this match). We are not attempting to identify the promissory exchanges between expatriates and (the more remote) policy agents, but rather use psychological contract theory to interpret why we see the mutual actions that we do. In order both to understand the research issues involved, and guide how such changes in practice might be made, we examine two research questions: (1) how are organizational and individual goals in expatriate assignments either complementary or conflicting, and can they be balanced more appropriately to improve GTM effectiveness (as supported by psychological contract theory); and (2) are organizational GTM systems and structures being developed in ways that would support both sets of goals simultaneously?

3. Methodology

As there has been little research to date addressing both individual and organizational goals of expatriate assignments in single studies and to support the literature review presented here, qualitative data were gathered in two small-scale pilot studies. The data collected is not intended to deliver generalizable conclusions but to develop an evidence base to assist further theorizing in this field. Qualitative data collection was deemed most appropriate to explore the experiences of the actors involved as GTM policy-makers, managers, and expatriates to understand the context in which GTM activities are being implemented. Both studies were carried out in the services sector, in which highly specialized employee knowledge facilitates the increasingly complex configuration and operation of global production networks (Dicken, 2011). These firms create value through their selection, development, and use of human capital, and are expected to be particularly sensitive to the individual needs and expectations of talent.

Study 1 is conducted within a single case study: a professional-services firm headquartered in the U.S., referred to further as ProfServ1. ProfServ1 has 180,000 employees in more than 150 countries globally. Interviews which lasted on average 1.5 h were held with 10 GM/HR specialists and 6 expatriates (3 assigned by the organization, 3 who volunteered for the assignment), asking them to comment on their firm's GTM goals and challenges at both the organizational and individual levels. These were recorded and transcribed. Questions to the GM/HR specialists covered the following areas: the organization's current talent supply and demand factors; how expatriates are identified; how expatriate

Table 1
Study 2 interviewees.

Interviewee job title	Country of origin	Organization profile
Group International Mobility Manager	France	FinServ1: Financial services company property-casualty insurance, life and savings, and asset management. Revenues €90 billion. Operates in 57 countries with 163,000 employees
Head, International Mobility	United Kingdom	FinServ2: Personal, private and retail banking. 80% of income from Africa, Middle East and Asia. 1700 branches in 68 countries. 89,000 employees
Regional Head – EMEA, International Assignment Mobility	Switzerland	FinServ3: Wealth and investment banking. Revenues CHF 25 billion. Operates in 62 countries. 62,000 employees
Senior International Mobility Manager	United Kingdom	FinServ4: Retail, commercial, private and global banking services. Revenues $56,700 billion. 267,000 employees. 6600 offices in 80 countries
Executive Director, International Assignments	United States of America	FinServ5: Global investment banking services. Revenues $28 billion. 32,000 employees
Director – International Assignment & Comp & Ben	France	FinServ6: Retail banking, Investment banking and global investment services. Revenue €26 billion. Operates in 77 countries. 160,000 employees
Global Head of International Mobility	Germany	FinServ7: Global universal bank with retail. Corporate, asset and wealth management and global transaction services. Revenues €32 million. 100,000 employees in 70 countries
VP Human Resources	United States of America	FinServ8: Global wealth and asset management and institutional financial services. Revenues $32 billion. 58,000 employees, in 1200 offices in 53 countries
Head of Mobility	United States of America	ProfServ2: Multinational media and information firm. Revenues $13 billion. Operates in 100 countries with 60,000 employees
Director of Global Relocation	United States of America	ProfServ3: Multinational software solutions corporation. Revenues $74 billion. 97,000 employees
HR Consultant Global Mobility	Germany	ProfServ4: Global IT and enterprise software multinational. Revenues €16 billion. 115 country subsidiaries with 61,000 employees
Executive Director, Human Resources Strategy	United Kingdom	ProfServ5: Professional Services 93 member firm network, assurance, tax and advisory services. Revenues $4 billion. 28,000 employees across 490 offices in 100 countries

assignments are managed; how GTM strategy is created, and the main challenges faced in implementing the strategy. The expatriates were asked about the process of identification for the assignment, the support provided related to the assignment, the extent to which the expatriate experience is intended to be standardized, and the challenges faced during the assignment and how these are handled and by whom.

Policy-makers do not operate in a vacuum. The decisions they make about any one element (such as meeting individual goals in GTM through greater flexibility) are made in the context of, and with consideration to, the broader strategic domain. In order to understand how the conflicts and complementarities identified by Study 1 are handled by GTM decision-makers, we draw upon a second independent dataset in Study 2. This included 12 interviews with a broader range of most senior global mobility managers from a sample of 8 global-brand financial (FinServ1–8) and 4 professional service MNCs (ProfServ2–5) (see Table 1). The interviews which lasted on average 1 h and were recorded and transcribed were semi-structured, based on a schedule that included probing questions covering policies for flexibility in GTM programs, the opportunities and risks associated with individualized flexibility, and the support systems used. Also changes in expatriate behavior talent-assessment and career-management issues were also covered.

For the purpose of empirical observation, the transcripts from both sets of interviews were coded based on an iterative process of comparing themes from the literature with themes emerging from the data. This process was carried out first by one of the members of the research team for each study and then discussed with the other authors to determine the final coding structure.

4. Findings: Study 1

Exploring first the cited goals of ProfServ1's GTM strategy, from an organization perspective, four primary themes emerged: serving client needs (following global clients), building the

business overseas (new business opportunities; using in-house skills to deal with problems overseas), investing in top talent (selecting only the top performers for important, visible assignments), and developing future leaders: "as we start to think about grooming this next generation of talent and the future CEOs, you're going to want to have them have international experience" (Global HR Director). From an individual perspective, personal needs center primarily on wanting to follow a spouse moving overseas, or to return to family overseas, alongside more skill or career development-oriented reasons: "there are a myriad of reasons why we send people. You know, personally driven, organizationally driven, and more often than not, a lot of what we're doing now comes up because of personal-driven situations" (Business GM Leader 2).

Secondly, we explored the perceived challenges to achieving these GTM goals. From an organization perspective, these focused on: prohibitive levels of cost, particularly affecting the ability to send people out for purely developmental purposes: "if anything prevents us from increased global movement, you know, it's just the cost of assignments" (Country GM Director); the importance of getting the repatriation process right to retain talent; and the difficulties of encouraging global mobility, persuading business managers to let go of their top talent: "you might think that you're saving this guy now, but if that opportunity isn't there for him next year, he's going to be very upset...and he's going to go somewhere else" (Business GM Leader 1). Individual GTM challenges centered around: how an expatriate assignment can hinder career progression due to being 'out-of-sight, out-of-mind', the loss of networks and connections with colleagues and clients in the home country, and the assignment experience being affected by a lack of preparation before departure: "somebody's really engaged in their career and committed and has these specific clients, and they feel that they will risk losing that network and those prime engagements if they go overseas" (Country GM Leader).

Regarding the systems and structure that ProfServ1 has in place to support these goals and challenges, the most frequently

mentioned organization response is a push for centralization of GTM activities to create standardized programs which can be implemented firm-wide: "[GM] has created templates and forms and checklists and best practices [...] to try to really take a lot of the noise out of the experience so that it really is about living and working in that country" (Global GM Director). Interviewees also focused on the importance of aligning the firm's HR system with GTM goals to encourage a culture of mobility: "sharing success stories of expats who've been out and how they've returned to have a significant impact on clients" (Country GM Director). From an individual perspective, two different systems to support self-identification were highlighted: individual opportunities for being able to self-nominate for expatriate assignments (by checking a box on the annual performance appraisal form), and an increasing emphasis on the individual's own responsibility to manage their career: "there's a huge emphasis on career development but it's sort of up to you to drive a lot of that stuff" (Expatriate 6).

Interviewees also mentioned the importance of at least some flexibility in the GTM program reflecting local circumstances: "I believe it's very personalized and very much dependent on the assignment and actually really just depending on the country that you're going to, because the firm in reality operates very differently in each country" (Expatriate 2). In contrast to the focus on centralization, there was a clear recognition of the need for this to be balanced by a degree of flexibility: "the firm believes that these opportunities are important to our people, and so they want to open up those opportunities to our people, and people can express interest, and that's why the majority [of mobility assignments] are self-initiated" (Country GM Director). The remaining set of findings explores the benefits and challenges of adopting this more flexible approach to GTM.

As noted, ProfServ1 has an open system for people to self-nominate as candidates for an expatriate assignment, from which the high performers are selected for assignments. In practice, this process is most akin to the volunteer SIE model of expatriation – individuals seek overseas assignments, and often transfer on a local employment basis, albeit sometimes with enhancements, to another member firm within the global partnership structure. According to interviewees, this level of flexibility holds numerous advantages for the organization: a positive employer reputation, an expanded talent pool, and the potential to reduce costs (by not offering the same enhanced package to volunteer SIEs as to initiated AEs): "a true [volunteer] is that that person will probably take a pay cut. We've built the program so we can be as cheap as possible" (Business GM Leader 1).

From an individual perspective, the main advantage mentioned was that opportunities were available to a wider range of people (a more inclusive GTM approach). In addition, there were also many comments on the mutual benefits of this flexible, inclusive GTM approach, the primary one being the ability to balance client and personal needs (matching an individual's request with an identified business need): "we understand the importance of global mobility from an employee development perspective. We understand the importance of it from a leadership perspective. We see that our clients are demanding it so I think that there are a variety of things that are coming together at the same time that are pushing us in that direction" (Global HR Director).

Both the organization and individuals, however, face challenges from this individualized flexibility. For the organization, more flexibility naturally means less standardization, which in turn results in less transparency of the GTM program across the business: "if we send somebody out for a talent-driven reason and we're trying to accommodate their needs or what have you, we might not get as much of a business bang for our buck back" (Business GM Leader 2). For traditional AE assignments, flexibility

raised two other challenges: the more individualized the experience, the more unique and complex the support for such a system; and if parts of the business saw that there was flexibility available, they would push hard for this flexibility to work in their favor. From the individual perspective, interviewees noted how non-standard practices decrease perceptions of fairness: "he was upset that the firm found those people jobs and not his wife a job" (Expatriate 4); and that more flexibility through volunteering transferred a greater amount of responsibility to the individual making the move (rather than the organization taking this on, as for an AE).

Due to the pressures of cost and diverse business needs, in addition to people being able to self-nominate, ProfServ1 was also shifting to alternative forms of global mobility, particularly short-term, international projects. In general, comments regarding these projects were positive. These highlighted the broader range of international experiences open to individuals, as well as the projects more closely matching what employees were requesting: "what we're hearing from our people and certainly the newer people that are coming to [the firm] is they're less interested in going someplace for a long period of time and they're much more interested in having shorter-term experiences" (Global HR Manager). Because of the generally shorter duration of these projects, this also meant that both the individual and the organization were taking less risk (lower levels of investment and less change and loss of networks being incurred): "if it [an international project] doesn't work out [...] you haven't put so much at stake right, for the organization and for the person" (GM Projects Leader). However, there can also be a number of disadvantages associated with short-term international assignments: when projects are anticipated to be of short duration, less preparation and support is given for the international experience, although they can actually end up rolling on for a number of years. In addition, managers on short-term assignments may have regular travel commitments to many countries which puts pressure on family and work commitments at home.

5. Findings: Study 2

The aim of Study 2 was to examine more generally the drivers that have created the organizational response of a flexible GTM policy. To maintain anonymity, quotes are assigned to the sector the firm is in rather than to the specific organization. Across FinServ1–8 and ProfServ2-5, there were three parallel forces driving policy redesign (similarly observed in Study 1):

- Increasing control: with more centralized oversight over mobility, regularizing the governance arrangements, and standardizing policies;
- Reducing delivery costs: with various program offerings that enabled what were termed 'expatriate lite' arrangements;
- Increasing program flexibility on multiple levels.

Policy designed at better matching organizational goals and individual needs was generally embedded within a range of parallel strategic considerations. It was also typically subsumed within a broader HR strategy:

"...In 2006 the organization adopted a global strategy and essentially that global strategy became the road map in principle for all of our future activities. [...] The driver was to be able to match talent and get resources from A to B in an efficient, effective manner, so the driver was creating a common culture across the organization by sharing knowledge and filling capability gaps" (ProfServ).

Table 2
The operationalization of different categories of AE or SIE mobility variants.

ProfServ mobility policy categories	FinServ fes
• Employee-requested moves (SIE) supported by compliance-related benefits such as tax preparation, immigration assistance, airfare, some small amounts of cash for relocation, a home country pension scheme, social security and a right to return	• Assignee policy for the traditional long-term fully loaded expatriate package (AE)
• Professional development moves (SIE) initiated by people wanting to broaden their own capabilities through more complex jobs	• Explorer policy for long-term but more developmental moves for more junior staff (AE)
• Career development moves (AE) initiated by the business for longer-term talent and future leaders, where the organization wants the employee to have experiences that are motivational	• Short-term assignee policy for 3–12 month assignments (AE)
• International careerist arrangements (AE) for business units that had posts that needed to be staffed by sequential and successive assignments, but where professional moves did not need a high level of personal support	• Developmental, short-term assignee policy, moves usually for international graduates (SIE)
• Important business-need moves (AE) used to extend the business into certain areas but were dependent upon skills not found in-country, and where the individual demonstrated they were the strongest talent for the position	• Employee-requested policy, where an individual does not receive many benefits, as the employee wants to go somewhere, the organization wants to send him or her, but expects him or her to return within 5 years (SIE)
• Critical business-need moves (AE) defined for moves that required a specific individual to become mobile, involving a high degree of incentive and the triggering of a maximum level benefits	• Permanent transfers from a local contract to another local contract (could be either AE or SIE)

Note: Each type of move is classified as either organization-assigned (AE) or self-initiated (SIE) based on who is considered to benefit most from the type of move.

The majority of organizations in Study 2 had moved to the second stage (Sparrow, 2012) of customized flexibility based on a variety of set policy types. They established high levels of policy standardization, based on a strategy of centrally managed flexibility. This enabled customization of this policy to a greater variety of different mobility populations. The interviews showed that the number of policy options deemed sufficient by interviewees had increased, with several organizations now offering policies tailored to multiple international employee populations.

In most cases, there were still rudimentary differentiations – between full-benefit expatriation, short-term assignments, or business commuters – but in some instances either the organization or the individual motivation for mobility was given more emphasis. Table 2 presents two examples of the most sophisticated variations in mobility policy categories.

Another way in which more flexibility in mobility policy might be enabled – what Sparrow (2012) identifies as a third stage – was to allow a move toward managed individualized flexibility, through negotiation and bargaining on the basis of previously learned and established mobility principles and protocols. The findings show that this approach is still rare, but is forming the basis of policy experimentation. Only three out of the 12 organizations interviewed had either implemented a stage-three flexible approach or were in the process of doing so. Another two were in the process of actively analyzing the implications of individualized flexibility with an intention to adopt the policy. Three had either actively rejected the option, or had decided not to give it consideration. Four considered themselves not yet to be at a stage of evolution to even raise the issue. Interestingly, the ProfServ organizations were, in general, far less sophisticated, or at much earlier stages in the journey than the FinServ organizations. Within the FinServ organizations alone, there were clearly different positions that were taken, reflecting a series of important internal contingencies.

For those organizations that had considered but *not* adopted an individualized approach to mobility, a range of factors were thought to make this more advanced form of flexibility unattractive or unworkable (see Table 3). For example, there was the perceived sense of danger of overly powerful business units acting in a limited-interest manner if they were given this degree of freedom. In other scenarios, it was felt that the homogeneous demographics of the expatriate population reduced demand for variation in policy. There were also concerns about the current level of maturity of other stakeholders in the organization to manage the flexibility, and the variable quality of knowledge and

insights into international management issues involved amongst the HR Business Partners. Additionally, there were fears that a person-based rather than assignment-based approach to business value would be detrimental to the organization's culture.

In contrast, the main drivers for considering individualized flexibility were: changes in the nature of assignee-roles, forcing more flexible consideration of program elements; increased demands for flexibility from business units; more employee-driven requests for flexibility; and increased cost considerations. Where organizations were pursuing individualized flexibility, it was clear that the policy had very significant impacts for the sorts of governance arrangements that had to be put in place. Organizations had to be very clear about the ways in which they wished to differentiate benefits, which might be on the basis of hierarchy, geography, demographic segment and associated individual needs, or the type of transfer or assignment.

Where firms were moving toward a stage-3 level of evolution (enabling high levels of individualization in the arrangements), three main management considerations were identified: new management arrangements needed to mitigate the welfare and corporate responsibility considerations that were triggered by the flexibility; the need for alignment of the mobility program offerings with the underlying organizational rewards philosophy; and the need for the establishment of a link between more individualized entitlement to flexible mobility and benefits, with the need for an organizationally determined talent assessment.

The interview quotes (see Table 4) highlight a clear set of policy considerations that were inherent in increased individualization that concerned welfare dilemmas. Depending on the pattern and type of mobility, there were organizational concerns about what benefits should be made flexible or not, which aspects of mobility and assignment operation should be under the discretion of the individual assignees, or of HR Business Partners, or local line managers. These levels of discretion and choice, in turn, rested on implicit judgments as to whether the individuals seeking more flexible mobility have the ability or not to make 'wise' decisions.

The first area was the need for mobility decision-makers to *understand the greater family-unit need*. For less experienced managers, the concern was that if individualized flexibility were granted when business units faced an environment where host sites were under pressure to cut costs, individuals might not have the maturity or wisdom to make the right choice for themselves and their family in terms of the mobility conditions they accepted or not. The second set of behaviors to guard against concerned *security and assignment productivity*, such as housing

Table 3
Rationales for creating or avoiding individualized flexibility within mobility policy.

"…I think that the reason for that [trading off flexibility] is that we have member firms at differing, very disparate stages of alignment… we talk about the way we'll administer, we'll give freedom to the degree that it doesn't hurt the integrity of the process" (ProfServ)

"…Probably 85–90% of our assignments today are reactionary without any strategic forward thinking on the actual talent management component… if we were to develop an approach and a philosophy regarding flexibility principles that were too restrictive, our client groups will not use this, they'll just go figure something else out" (ProfServ)

"…We offer a number of variations of policy and handle flexibility by allowing between these… we come up with different scenarios depending on what the customer is willing to pay" (ProfServ)

"…With the current environment we are concentrating on improving the organization and administration of the program rather than meeting the particular wishes and desires of different international assignees" (FinServ)

"…We could be driven to more flexibility by the business and cost, or we could have more flexible packages for employees to suit their circumstances to improve productivity. Our organizational preference is the latter" (FinServ)

"…The risk with too much flexibility is that it dissolves the value-add of the international assignment function in its knowledge and expertise"(FinServ)

"…We take a 'core plus' approach for the business, so most entities must offer the core benefits and then have the option around structuring other benefits. Core plus is for the business, not for employees as such" (FinServ)

"…we gave flexibility to line managers to negotiate certain parts of the package… so that we would be able to meet the two goals… a number of duty of care items, mainly tax and healthcare, were non-negotiable, but everything else, including area allowances, mobility premiums, flights home, accommodation, and children's education, were up for negotiation" (FinServ)

"…The flipside with flexibility is whether it diminishes the support that should be in place and creates too much of a dilemma for the business in trying to choose what to give… Looking at flexibility allows us to assess the reasons behind a particular move" (FinServ)

"…We have global standard policies at the moment and we're not comfortable that we are able to run these difficult global processes really well so we're not ready to open up to a level of flexibility that would be more difficult to manage" (FinServ)

"… With everything being negotiable, nothing was a policy exception. Only healthcare and tax needed approval. Policy exception requests for these were very rare. Also, flexibility means that there's no cap, so items can be negotiated up as well as down. We started to see a bit of this at the very highest levels on things like education" (FinServ)

"…When you take the structure away, it reduces the formal decision process… [but] it slows down the decision-making process as costings and [contract] terms need to be agreed and signed off before getting… agreement to the assignment" (FinServ)

considerations, especially in hardship locations. Organizations could not allow individuals to self-initiate such choices. Managers new to a market might seek to choose a cheap apartment out-of town, only to realize later in the assignment that it is detrimental to performance. Housing location also impacted the level of security and aspects of the quality of non-working life, including levels of rest and recreation.

Because the adoption of individualized flexibility was often associated with an option for those items that were not included in the package to be exchanged for cash, those organizations that had formalized policy were forced to become more explicit about their underlying rewards principles. Individualized flexibility created concerns about leveling – or the consequence of not leveling – received or foregone benefits and cash payments. Interviewees also signaled the need for policy to try to ensure that work-life balance issues were given consideration very early on in the resourcing process.

Finally, regarding talent assessment, two developments were highlighted: the education of key stakeholders; and the need to provide greater information. One organization provided e-enabled and self-service support, especially at the earlier stage of the resourcing process. Another used e-tools to enable the development of strategic resourcing plans (examining potential talent across businesses, geographies and grades), posting of international vacancies to facilitate self-initiated moves, and the signaling of high-level selection criteria. A final risk identified (but also an opportunity) was that attention needs to be given to the link between the level of mobility-policy flexibility afforded to the individual, and whether those assignees afforded access to individualized approaches are truly seen as 'key talent' or not.

Table 4
New considerations created by individualized flexibility within mobility policy.

Welfare issues

"…We need to ensure that we are able to protect employees for their own good. This is connected to the level of maturity in our markets and management teams, and their ability to make the right decisions" (FinServ)

"…From a business perspective, we need to stop people from choosing a blend that makes it more likely for the assignment to fail… [We know that] accommodation and schooling are important because if they are cut back on too much, assignments tend to fail" (FinServ)

"…Welfare is very important and it comes back to us being an employer of choice… One of the current debates is that the policy only stipulates core benefits, but I believe that optional benefits should be highlighted as potential, for debate, and not be hidden from people" (FinServ)

Reward issues

"…To have flexibility in hiring people for a particular role is useful, particularly for locations where it's difficult to find resources to go in. …There is a risk of the perception of inequity by employees but there is also a risk to the business if you can't get someone to go in" (FinServ)

"…If you have enthusiastic people in their mid-twenties to thirties, in their early careers and wanting the experience and you throw the full package at them, they become spoiled and difficult to mobilize further along the line. The "full balance sheet" is not necessary for key talent – it's more for someone with a family and all the baggage, in later career, with a set of skills and influence that are desperately needed to fill a gap in a location which needs to be set up or run. That's where the balance sheet policy is needed. We need to help the business understand where to spend the money i.e. not just on key talent, but on the right talent". (FinServ)

"…We hold a line where we don't allow people to encash or trade-off benefits. They're to be provided for a purpose and if they're not needed, they're not needed. There's a moral argument about giving a person a big house and schooling when he's on an income to afford it himself if he's back home" (FinServ)

Talent assessment issues

"… There's already pressure to reduce the short-term policy for graduate rotation moves. The trouble is that although you can have principles for how something is used, it can quickly become the cheap alternative and it suddenly won't be just for graduates. My concern is that if you start to dissolve the criteria, the flexibility makes it into a bit of an open season for who can shout the loudest and negotiate the most. It puts a lot of pressure on the business. They prefer to be given guidelines, because then they can blame HR and say "my hands are tied!" (FinServ)

"…One of the dynamics that we have to think about from a corporate legal perspective, is that statistically white men are better negotiators [of flexible terms]… we have to be so careful… In an effort to be sure that we are not discriminatory in our approach, we don't approve of [individualized bargaining]… it could have unintended consequences back to the organization as we know" (ProfServ)

6. Discussion and future research

We have addressed the need to explore how MNCs attempt to balance individual and organizational goals through what we have termed a mutual-benefits approach. We now develop propositions for future research around these themes.

From Study 1 it was seen that ProfServ1's organizational GTM goals are clearly consistent with the global mobility literature (e.g. to follow clients or develop new markets, and invest in future leaders of the firm). Similarly, the drivers for individuals to go on expatriation assignments are not unfamiliar: a desire to improve skills, gain experience, and further their careers (Suutari, Brewster, & Tornikoski, 2013). However, Study 1 also highlighted the importance for employees of meeting personal needs, such as moving overseas to be with family. Given this is a professional-services firm staffed by highly educated, ambitious knowledge workers, both human capital theory (Bolino, 2007) and the 'i-deals' literature (Rousseau et al., 2006), suggests that that this should be an increasing trend in organizations.

Psychological contract theory requires there to be evidence that the 'deal' is subjective and differs between individuals and employee segments. This was clearly the case. Study 1 highlighted the category of expatriate which to date has received little attention in academic research: self-initiated organization expatriates, i.e. employees who freely volunteer to go on expatriate assignments, making personal and career sacrifices to do so, but remaining with their current employer. Study 2's examination of the broader cross-sector GTM policy also evidenced the increasing range and variety of global mobility policy types (Haslberger & Vaiman, 2013). It is therefore evident that research needs to expand the accepted definitional elements of SIE in particular. Currently these definitions are as being 'without assistance' and having 'local contract' arrangements (Andresen, Al Ariss, et al., 2013; Vaiman et al., 2012). Recent variation of policy options now captures employees who have self-initiated motivations, but who move within their existing employer and are afforded assistance and financial arrangements, though these are less generous than an AE-move. Al Ariss and Crowley-Henry (2013) have highlighted that SIEs are assumed to be able to choose freely where and when to go and return on assignment, but research has not considered influence factors such as organizations or economic drivers potentially forcing such decisions (Dickmann & Docherty, 2010). Policy-makers are delineating important sub-categories within AE and SIE populations, reflecting the observation in the literature that both AEs and SIEs have different sets of motives for assignments (Altman & Baruch, 2013; Cerdin, 2013). This leads to our first proposition for future research:

Research Proposition 1. *Future research should distinguish between the motives behind two types of expatriation within MNCs: organization-assigned expatriates and self-initiated organization expatriates.*

The adoption of a mutual-benefits perspective may be a more fruitful way of segmenting mobility populations. Ways of linking employees and organizations through notions of partnership can lead to benefits for both parties (Inkson, 2008). As Study 1 shows, if an assignment is viewed as an opportunity for both organizations and individuals to improve their long-term situation (e.g. through global expansion and career development respectively), this highlights complementarities in the system. However, when the short-term challenges to achieving these goals are compared – cost and process issues for the organization, and personal sacrifices of short-term career progression and networks for individuals – this is where conflict might arise. In other words, although goals may be shared, the realities of the challenges of the process for both parties differ. The HR/GM function needs to address both sets of

challenges successfully for the shared long-term goals to be achieved.

Focusing on career progression, if individuals are prepared to make sacrifices, including a lack of guarantee of a good position in the home country to which to return, what are individuals seeking in return for mobility? One explanation might be the emergence of a new expatriate psychological contract where individuals are seeking to maximize rewards for taking the assignment, and who see the main benefit of the assignment not in internal promotion but increasingly looking to the external labor market (Pate & Scullion, 2010). Alternatively, it may be that the personal needs are greater than any career goals, perhaps supporting the 'i-deals' notion (Rousseau et al., 2006): whilst volunteers focus more on expatriation for self-development or to achieve personal rather than corporate goals, assigned expatriates primarily seek to achieve company goals in order to benefit from the career progression. In the domain of global mobility, it will be interesting to explore this further beyond the contexts of the empirical studies presented here:

Research Proposition 2. *Future research should explore whether the 'i-dealization' of expatriation is occurring on a broader scale beyond the financial and professional services sectors.*

Given the diversity of goals and challenges from both the organization and individual perspectives, we have to ask whether the benefits of expatriation can actually be realized for both the organization and the individual simultaneously? Study 1 illustrated both a stronger business imperative requiring a short-term return on investment from assignments (i.e. direct added-value of the assignment itself), and increasingly more idealistic and uncertain long-term returns (i.e. much less use of AEs for developmental purposes). Potentially this means that the organization benefits in the short-term whilst the person is overseas, but the individual relies on a successful return for their career to benefit (a much more uncertain, long-term investment).

Research Proposition 3. *Future research should focus on how the balance between short and long-term returns on investment by the organization in expatriate assignments impacts individual career capital.*

Given the enthusiasm for the system of self-initiated nominations for expatriate assignments in ProfServ1, we might conclude that individuals are prepared to take on the additional responsibilities of managing the expatriation process with the longer-term goal of this enhancing their career, supporting Andresen, Biemann, et al. (2013). From an organization perspective, ProfServ1 appears to be balancing the contingency-theory approach of being driven by external client needs to globalize (Baden-Fuller & Stopford, 1994), with the 'inside-out' approach by focusing on the psychological contract needs of its knowledge-worker population (Rousseau et al., 2006). However, as evidenced in Study 2, in order to both accommodate *and* mutualize greater individualization, policy-makers have to design and evolve more complex managerial arrangements. Reflecting the 'deal' language in the 'i-deal' label, they have to create a market around the management of talent and global mobility. This leads to the fourth proposition for future research:

Research Proposition 4. *Future research should explore the extent to which responsibility for expatriation assignments being delegated in MNCs to the individual as part of a more flexible approach to GTM is welcomed by individuals.*

Psychological contract theory argues that contracts are dynamic in response to emergent behaviors. Again, this is clearly evident from the studies presented here. From an organizational-challenge

perspective, one of the most prominent GTM issues is cost (Suutari & Brewster, 2001); this played out at a number of levels in ProfServ1. Firstly, expatriation had to be seen as an investment in order to gain business support. Secondly, the firm was using less assigned expatriation (AEs) in favor of allowing people to volunteer themselves (as SIEs). This reduced costs for the firm, but simultaneously restricted the number of AE opportunities for purely development goals. Thirdly, the firm was introducing different types of 'international experience' to reduce cost, including increasing the use of short-term international projects. However, the findings from Study 2 showed that when seen through the eyes of corporate policy-makers, the growth of more flexible forms of global mobility is managed in an embedded strategic context, the three driving forces being: increasing centralized control; reducing mobility delivery costs; and increasing program flexibility. HR/GM functions had to align these three strategic drivers, and this alignment varied across organizations.

We draw three conclusions from this for exploration in future research. First, HR/GM functions do not – and cannot – manage mobility-program flexibility as a single strategic challenge: program flexibility needs to be aligned with other strategic changes taking place around assignment delivery. Second, despite our observations about the increased importance of self-initiated mobility, for the majority of organizations it is seen as just one development given the emergence of a range of more differentiated international talent pools whose needs must be met. Third, a number of stakeholders are involved in the global-mobility process, i.e. line management, corporate HR functions, HR Business Partners, the GM function policy designers, and the expatriates themselves: each has a different line-of-sight of (or may be blinded to) the GTM issues involved. We summarize these three conclusions in the following statement for future research:

Research Proposition 5. *Future research should explore the extent to which global mobility approaches need to be embedded in an appropriate and reinforcing broader GTM strategy that supports multiple stakeholders in order to be effective.*

When analyzed through the lens of senior HR/GM policy-makers, it becomes clear that many of the GTM strategies related to increased flexibility and individualization are based on a number of untested assumptions – these expectations, obligations and promissory beliefs might prove to be inaccurate. The following four assumptions that can be derived from our interview accounts should now be examined and tested. The first assumption is that the overall costs of assignments can be reduced through a policy of negotiating certain policy benefits, rather than having a philosophy based on universal entitlement. This counters the argument supporting standardization of GTM (Sparrow, 2012). Second, if a more decentralized and business-driven choice process over the elements to be included in a mobility decision is introduced, it produces a better fit between individual and organizational goals (based on psychological contract theory reasoning, focusing on meeting individuals needs to determine mobility decisions rather than external drivers: Rousseau et al., 2006). Third, by allowing decisions to be more self-managed, the reduced time that HR/GM staff need to devote to each negotiation means that central mobility resources can be freed up to focus on more strategic concerns – a well-rehearsed discussion in the strategic human resource management literature (e.g. Ulrich, 1997). And fourth, that the design of policy entitlement based around employees selecting and trading items to meet their personal circumstances will improve levels of engagement with global mobility, providing a better return on investment (based in the 'i-deals' notion: Rousseau et al., 2006).

Research Proposition 6. *Future research should explore the extent to which a mutual-benefits approach to GTM is defined by:*

> *reduced assignment costs (through negotiation-based policies);*
> *alignment with both individual and organizational goals (through local decision-making);*
> *operational efficiency (through a self-managed approach);*
> *effectiveness in creating assignment engagement (through individualization).*

There are clearly opportunities, but also considerable risks, associated with individualized flexibility, and the ability for both parties to meet their promissory beliefs and mutual obligations. Developments in program flexibility often mean that the HR/GM function is transferring responsibility to the expatriate, who selects a set of benefits or pursues a particular form of flexibility. Three types of welfare risk were identified in the empirical studies – to the individual, to assignment performance, and to corporate reputation – and the impact of these should now be explored. These risks may be mitigated by introducing strong governance arrangements, but some potentially desirable mobility options may be rejected if the expatriate population has inappropriate expectations, or cost pressures on local businesses are likely to produce dysfunctional behaviors. When considering levels of flexibility, HR/GM functions need to be explicit about their key principles relating to the underlying philosophy of mobility entitlements, the relative importance of individual and organizational goals, and the need to demonstrate cost or operational benefits. This leads to our final research proposition:

Research Proposition 7. *Future research should explore the hidden welfare considerations in mutual-benefit approaches to GTM (where people who are given more sway over budget or mobility decisions may seek options which are not necessarily in their, or their family's, best interests).*

7. Conclusions and managerial relevance

From both a theory and a practice perspective, it is evident that the effective adoption of a mutual-benefits perspective to GTM is challenging. If implemented effectively, this may be a useful source of competitive advantage in terms of sourcing the most appropriate talent into expatriate assignments. Both empirical studies presented here highlight that there are two necessary conditions before a mutual-benefits perspective can be formalized: a corporate culture that favors individualization; and the need for baseline sophistication in the way that existing (more standardized) levels of flexibility are managed.

The HR/GM function should be clear about a number of key strategies to make flexibility successful: aligning flexibilities with the general strategic and cultural context; targeting the governance challenges; having an underlying corporate philosophy about mobility entitlements and assumed consequences of flexibility; creating opportunities for the various stakeholders in mobility decisions; and limiting flexibility to when it makes sense. Clarity is also needed regarding the relative importance and balance between individual needs, work-life balance issues, and welfare considerations. Where decisions were made to change the current level of flexibility, they were based on complex political assessments about the level of power that the HR/GM function had, the additional resources the new approach would entail, but also the risks and consequences of maintaining the current status quo.

Both empirical studies showed that the implementation challenges associated with introducing more individualized flexibility in policies should not be understated. Once self-initiation

of mobility moves away from being an informal and undetected process, into a more formalized and managed form of GTM around which policies need to be established, it is evident that the pursuit of individualized flexibility is both complex and operationally challenging to manage. Although it might be assumed that a mutual-benefits approach automatically creates benefits, early adopters found there was a slowing-down of decision-making, rather than an assumed speeding-up. This is because allowing more self-initiation involves more idiosyncratic consideration of factors, and a higher level of skill and judgment to be applied to each decision. It also entails an increased volume in cost estimates to be carried out, greater variation in policy, and a significant need to invest in training to educate people involved in the process about how the system works.

Why is it important to understand how individual and organization goals might be balanced to the mutual benefit of both parties and to build propositions for future research? We have argued that psychological contract theory, and the need to understand the new reciprocities that exist in the perceived promises being made, shows the value of building an 'inside-out' approach, i.e. an internally driven GTM strategy. It also helps us understand what is going on and to predict how these strategies must evolve. As we have noted, many of the GTM strategies related to increased flexibility and individualization are based on a number of untested assumptions. We have highlighted a range of future research propositions which will help to explore some of these assumptions.

Our study has contributed to knowledge in a number of areas. First, we have identified and examined the issues that face organizations when seeking to use a mutual-benefits approach to achieve more effective GTM programs. As new GTM policies and structures are established to support both individual and organizational goals, and as flexibility increases, the pressures on GTM structures increase. There is a greater need to provide individualized support throughout the process due to variations from any standard formula for expatriation. Considering the HR/GM function, its primary goal has to be to support organizational goals; however, it is in the position of equally having to pay attention to the needs of individuals on assignment. We have highlighted that these personal needs appear to be playing a substantial role in the identification of expatriates. This raises many questions for future research, notably the need to test the assumptions inherent in much current GTM thinking, and also in understanding how the HR/GM function is responding to meet individual needs under the terms of the new psychological contract.

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